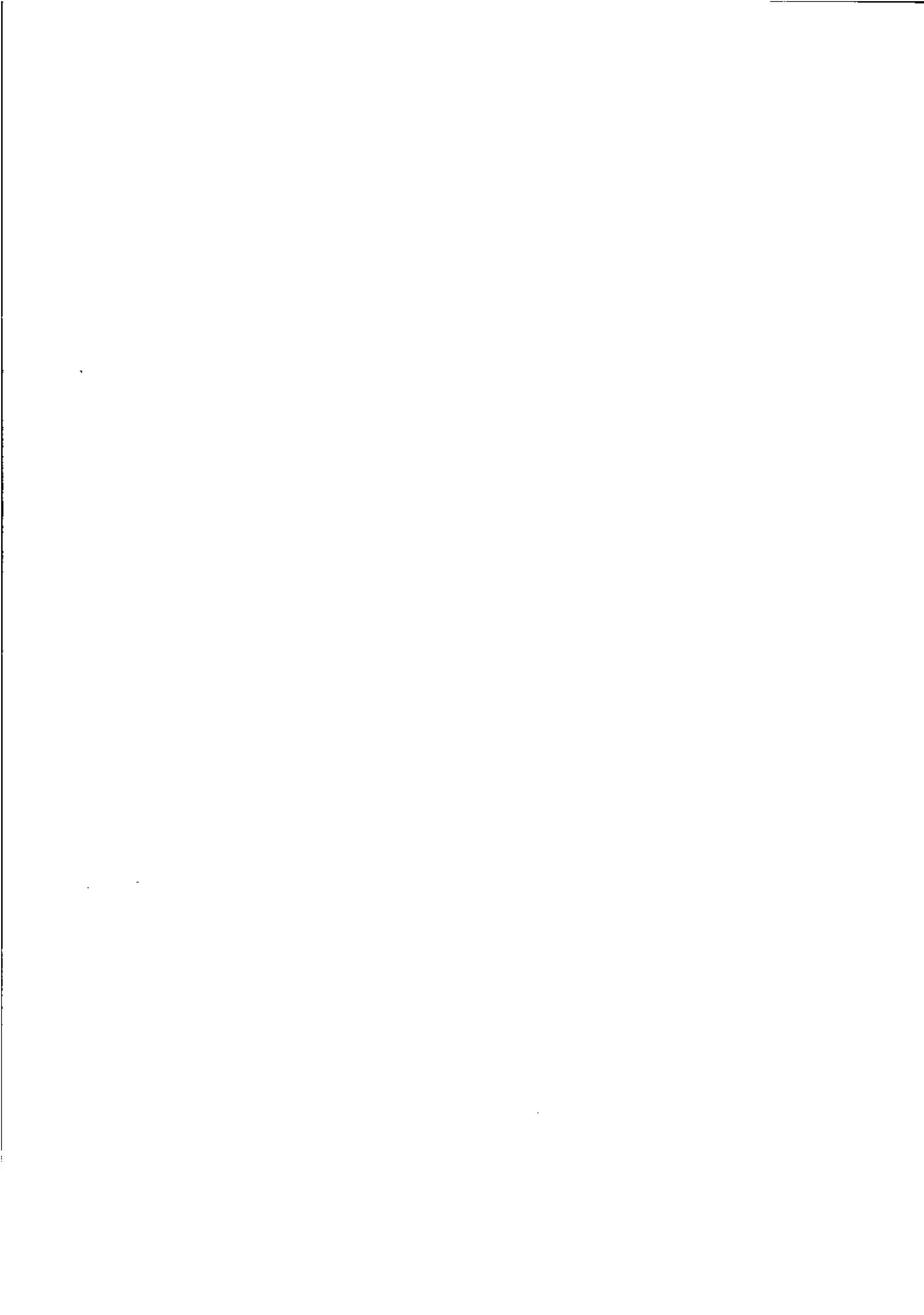




1995

AUSTRALIAN WINE AND GRAPE INDUSTRY

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**AUSTRALIAN WINE AND GRAPE INDUSTRY
1995**

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Australian Statistician**

AUSTRALIAN BUREAU OF STATISTICS

CATALOGUE NO. 1329.0

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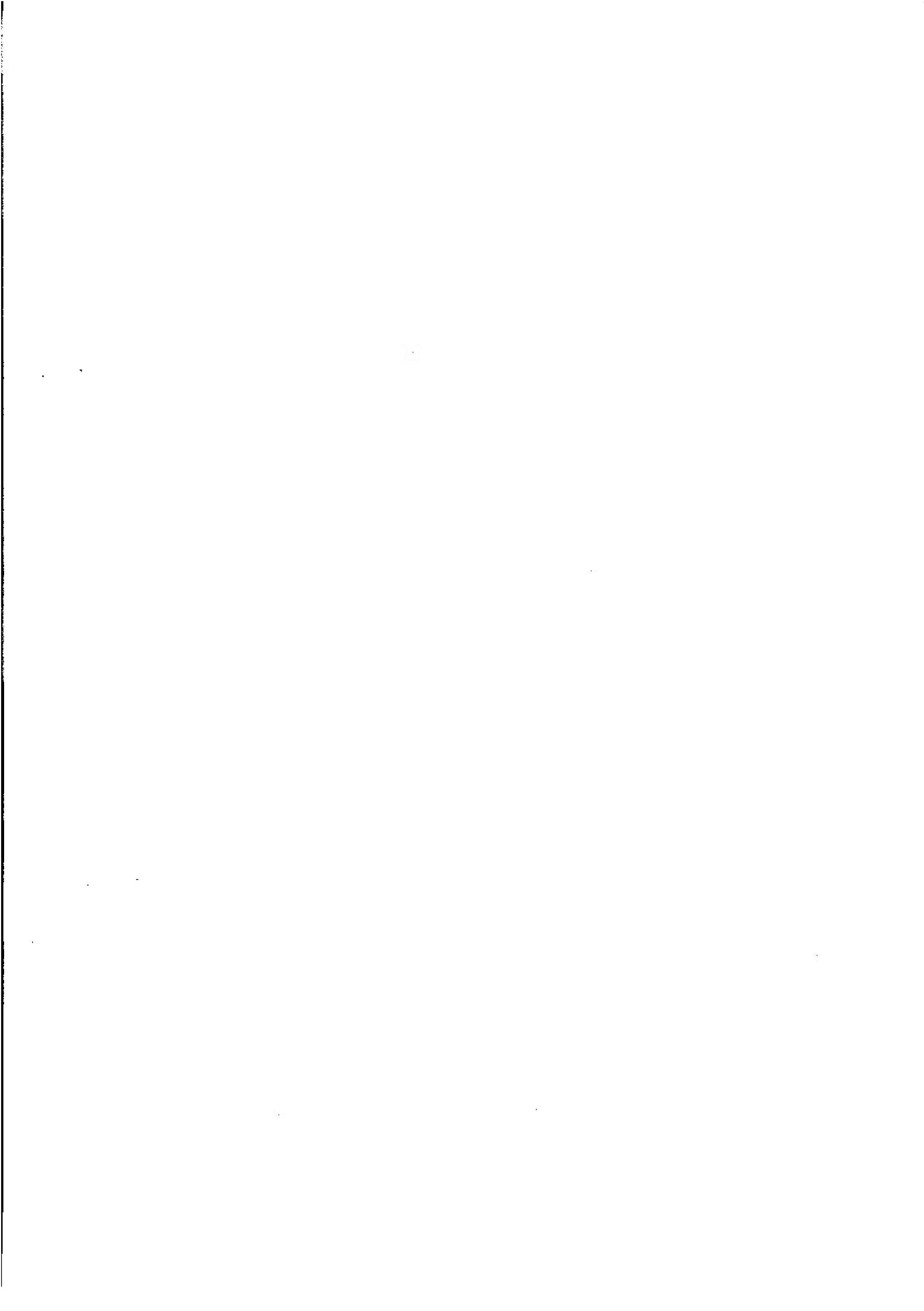
Cover photo: Vineyards, Piccadilly Valley, South Australia
Petaluma Limited

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INQUIRIES: • *for further information about statistics in this publication and the availability of related unpublished statistics*, contact Peter Carmalt on Adelaide (08) 237 7632 or any ABS State Office.

 • *for information about other ABS statistics and services* please refer to the back page of this publication.



PREFACE

Australian wine production is a dynamic and export-oriented activity. Australia, while contributing only 1.8% of the world wine production, is internationally regarded as one of the leaders of the 'New World' wine producing countries competing successfully with the 'Old World' producers such as France, Italy, Spain and Germany.

Wine related activities consist of two major operational areas, wine grape growing and winemaking. The Australian and New Zealand Standard Industrial Classification (ANZSIC) includes two industry classes covering these activities. These classes are Grape Growing (0114) and Wine Manufacturing (2183). However, these activities are sometimes combined, with winemaking companies growing their own wine grape supplies, and wine grape growers joining to operate cooperative winemaking ventures. In addition, some wine grapes are grown by agricultural businesses whose major activity is another type of farming. Likewise, some wine is produced by businesses whose major activity is not winemaking. These mixes of activities make it difficult to present a comprehensive view of wine related activity by relying on data presented only according to an industry classification. This publication therefore contains both industry and activity statistics.

This compendium is a summary of the statistics on grape and wine production and related activities collected by the ABS and from other sources. The first issue replaced *Wine Production, Australia and States* (8366.0), an annual publication containing statistics on wine and spirit production, materials used and stocks held by winemakers. This second issue contains the final data on area of vines, grape production by variety and State and regional data previously published in the annual publication *Viticulture, Australia* (7310.0). Explanatory notes about these collections are available at the end of this publication.

Other topics include the structure of the wine manufacturing industry, domestic wine sales, overseas trade, prices, consumption, wine regions of Australia, brandy sales, persons employed in wine and grape production, and world comparisons.

This is the second edition of a wine and grape statistics compendium produced by the ABS. I welcome comments on the content and usefulness of this publication to enable improvements to be made for future editions. Comments can be provided to the Wine Statistics Unit, Australian Bureau of Statistics, GPO Box 2272, Adelaide, SA 5001 or telephone (08) 237 7632.

W. McLennan
Australian Statistician



SECTION 1 OVERVIEW

AUSTRALIAN WINE AND GRAPE INDUSTRY : STATISTICAL SUMMARY, 1994-95

Area of bearing vines ¹	hectares	62 290
Total grape production ¹	tonnes	766 923
Wine grapes crushed ¹	tonnes	629 833
Beverage wine production ¹	million litres	470.4
Beverage wine stocks ¹	million litres	642.5
Exports of Australian wine	million litres	113.6
Domestic sales of Australian Wine	million litres	313.4
Imports of wine	million litres	14.1

¹ First release of data.

The total area of vines at harvest increased by 8% from 67,124 hectares in 1994 to a record 72,707 hectares in 1995, surpassing the previous record of 71,317 hectares in 1975. Of the 1995 total area under vine, 10,419 hectares were not yet bearing. The total grape production from the 1995 vintage was 766,923 tonnes, a fall of 153,236 tonnes or 17% on 1994. Vineyard owners reported that they intended that 575,001 tonnes (or 75%) would be used in winemaking, 147,406 tonnes (19%) for drying and 44,515 tonnes (6%) for table and other uses.

Over 612,000 tonnes of grapes were crushed in 1995 by winemakers crushing 400 or more tonnes, a fall of 19% on the record 1994 crush. Beverage wine produced by these winemakers during 1994-95 was 458.4 million litres. While 14% down on the record 530.5 million litres in 1993-94, it is still the second highest production on record.

Beverage wine production fell 11% in South Australia between 1993-94 and 1994-95, with falls of 18% in Victoria and 17% in New South Wales. In contrast production in Western Australia remained unchanged.

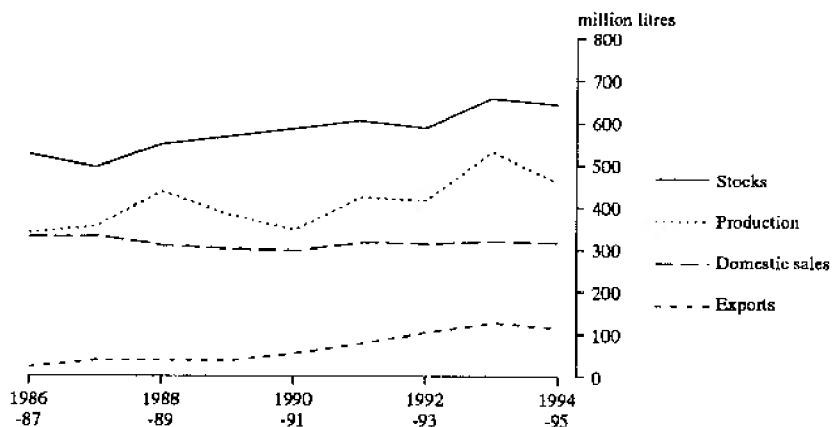
GRAPES CRUSHED AND WINE PRODUCED, 1994-95

Size	Enterprises	Grapes crushed	Beverage wine produced
tonnes crushed	no.	tonnes	'000 litres
50 to 400	131	17 570	12 000
401 to 10 000	54	111 688	77 307
10 001 to 20 000	11	161 289	115 139
20 001 or more	6	339 288	265 957
Total	202	629 833	470 404

¹ Estimate only, based on 700 litres /tonne extraction rate.

Australian wine production is highly concentrated amongst a few producers. While 202 enterprises crushed 50 or more tonnes of grapes in 1994-95, the largest 6 enterprises crushed 54% of these grapes and produced 57% of beverage wine.

AUSTRALIAN BEVERAGE WINE



Wine exports in 1994-95 were 113.6 million litres, a fall of 9% on the volume exported in 1993-94. Despite the lower volume in 1994-95 the value rose 5% from \$366.6 million to \$385.3 million. This represents a per litre value of \$3.39 in 1994-95 up from \$2.92 in 1993-94. In contrast, while imports of wine into Australia in 1994-95 were up 69% on the previous year, the value per litre fell from \$5.71 in 1993-94 to \$4.34 in 1994-95.

Domestic sales of Australian wine declined in 1994-95 by 2% to 313.4 million litres from 319.5 million litres in 1993-94. Over a 50 year period, per capita consumption of wine in Australia has risen seven fold from an average of 2.7 litres per person in the late 1930s to 20.2 litres per person in the late 1980s. Consumption has stabilised in recent years at about 18 litres.

In recent years the prices paid for grapes used in the production of wine in Australia have fluctuated widely as demand and supply changed each year. However, for the last two vintages the average prices paid by winemakers for grapes have increased significantly, by 33% in 1994 and a further 22% in 1995. Over the past five years the average price paid for winegrapes has increased by 68%. In contrast, over the past five years the average price of wine produced by winemakers (wholesale price) rose by 16% while the average price of table wine exported from Australia rose by 10% over the same period.

SECTION 2 VITICULTURE

AREA OF VINES AND PRODUCTION OF GRAPES

Australia's grape growers reported a record 72,707 hectares cultivated to vines, 2% higher than the previous peak of 71,317 hectares in 1974-75 and an increase of 8% from 67,124 hectares in 1993-94. The total area of vines had fallen in the 1980s due to vine grubbing. Three-quarters of Australia's grapevines are planted in South Australia and Victoria.

The area of vines planted or grafted during 1994-95 was 5,975 hectares, an increase of 104% over 1993-94. Nearly 52% of the area of newly planted vines was in South Australia. The total area of vines not yet bearing grapes was 10,418 hectares. The area of bearing vines increased by 1% to 62,290 hectares. Only South Australia and Tasmania had increases in areas of bearing vines.

The 1994-95 harvest produced 766,923 tonnes of grapes, a decrease of 17% from the 1993-94 harvest of 920,159 tonnes. The yield in tonnes per hectare of bearing vines was 12.3 in 1994-95 which is less than the 1993-94 yield of 15.0.

The most severely affected states were New South Wales with grape production down 26% and Victoria, down 23%. The yields in tonnes per hectare of bearing vines were 11.0 (down from 14.1) for New South Wales and 14.6 (down from 18.4) for Victoria. South Australia, with production down by 7%, became the largest producer of grapes in 1994-95, followed by Victoria.

GRAPE VARIETIES

In 1994-95, white grape varieties covered 45,234 hectares, an increase of 5% from the 1993-94 area of 43,158 hectares and comprising 62% of all vines. Red grape varieties covered 27,471 hectares, an increase of 15% from the 1993-94 area of 23,957 hectares. During 1994-95, 3,081 hectares of white grape varieties were planted with the largest being Chardonnay (1,907 hectares) and Semillon (391 hectares). New plantings of red grape varieties covered 2,893 hectares with the largest varieties being Shiraz (1,419 hectares) and Cabernet Sauvignon (984 hectares).

AREA AND PRODUCTION OF VINEYARDS, AUSTRALIA AND STATES, 1993-94 TO 1994-95

	Area of vines at harvest				Grape production			
	Not yet bearing, planted or grafted				Grape production			
	Prior to reference year		During reference year		Total	Wine- making	Drying	Table and other
	Bearing	hectares	hectares	hectares				
New South Wales								
1993-94	13 338	488	546	14 372	141 690	37 671	8 669	188 030
1994-95	12 672	729	1 090	14 490	104 927	25 823	8 439	139 190
Victoria								
1993-94	19 535	732	774	21 041	167 083	164 058	28 092	359 232
1994-95	19 018	1 094	1 509	21 621	137 948	113 392	26 900	278 240
Queensland								
1993-94	1 001	60	93	1 154	413	—	3 636	4 049
1994-95	894	85	71	1 050	380	—	3 523	3 903
South Australia								
1993-94	24 844	1 253	1 382	27 479	338 579	9 879	2 498	359 957
1994-95	26 998	2 271	3 090	32 358	317 232	6 704	2 913	326 849
Western Australia								
1993-94	2 435	167	111	2 713	12 959	1 258	2 561	16 779
1994-95	2 415	197	175	2 788	12 314	1 487	2 740	16 541
Tasmania								
1993-94	253	72	29	355	1 066	—	—	1 066
1994-95	293	67	40	400	2 200	—	—	2 200
Australia								
1993-94 ²	61 417	2 771	2 935	67 124	661 813	212 867	45 479	920 159
1994-95	62 290	4 443	5 975	72 707	575 001	147 406	44 515	766 923

¹ Fresh weight.

² Includes Australian Capital Territory and Northern Territory. For 1994-95 data available on request or via AgStats.

AREA AND PRODUCTION OF GRAPE VARIETIES, AUSTRALIA, 1994-95

	Area of vines at harvest				Grape production			
	Not yet bearing, planted or grafted			Total	Grape production			Total
	Bearing	Prior to 1994-95	During 1994-95		Wine- making	Drying	Table and other	
	hectares	hectares	hectares	hectares	tonnes ¹	tonnes ¹	tonnes ¹	tonnes ¹
Red grapes								
Cabernet Franc	533	23	31	585	4 745	—	—	4 745
Cabernet Sauvignon	6 271	636	984	7 891	53 090	—	7	53 097
Current	1 183	96	26	1 304	1 158	11 761	6	12 927
Frontignac	169	—	—	169	853	—	24	877
Grenache	1 938	28	16	1 982	20 408	—	48	20 456
Malbec	278	7	4	289	2 953	—	—	2 953
Mataro	594	15	11	620	7 832	—	31	7 862
Merlot	755	75	81	913	6 037	—	—	6 037
Muscat Hamburgh	376	29	13	417	418	—	1 095	1 513
Pinot Noir	1 422	78	109	1 610	13 546	—	2	13 548
Ruby Cabernet	536	31	45	613	8 487	—	—	8 487
Shiraz	6 424	907	1 419	8 751	65 403	—	10	65 413
Tarrango	84	3	14	101	2 152	—	—	2 152
Other red grapes	1 935	149	137	2 220	6 364	748	12 607	19 718
Total red grapes	22 498	2 077	2 893	27 471	193 450	12 509	13 827	219 789
White grapes								
Chardonnay	6 503	1 434	1 907	9 846	57 123	—	8	57 131
Chenin Blanc	702	42	36	779	11 757	—	—	11 757
Colombard	934	58	67	1 057	20 726	—	—	20 726
Crouchen	171	1	4	176	2 591	—	—	2 591
Doradillo	623	1	1	625	11 867	—	12	11 880
Marsanne	26	3	1	29	271	—	—	271
Muscadelle	338	1	—	339	2 897	—	1	2 897
Muscat Gordo Blanco	3 359	52	94	3 505	60 445	3 711	46	64 201
Palomino	358	3	—	362	5 135	—	4	5 139
Pedro Ximenes	290	—	2	290	3 522	—	6	3 528
Riesling	3 534	35	32	3 601	32 976	—	—	32 976
Sauvignon Blanc	1 088	75	134	1 296	11 989	—	10	11 999
Semillon	2 986	168	391	3 545	31 313	—	—	31 313
Sultana	14 814	346	251	15 412	93 813	127 703	21 257	242 775
Taminga	51	1	—	52	974	—	—	974
Traminer	615	11	6	632	5 835	—	—	5 835
Trebbiano	940	—	1	941	11 707	—	5	11 712
Verdelho	220	26	52	298	1 783	—	—	1 783
Waltham Cross	625	15	6	646	3 123	3 100	1 845	8 067
White Frontignac	299	6	—	303	3 369	—	105	3 474
Other white grapes	1 317	81	97	1 495	8 332	381	7 390	16 104
Total white grapes	39 792	2 362	3 081	45 234	381 550	134 897	30 689	547 134
Total grapes	62 290	4 443	5 975	72 707	575 001	147 406	44 515	766 923

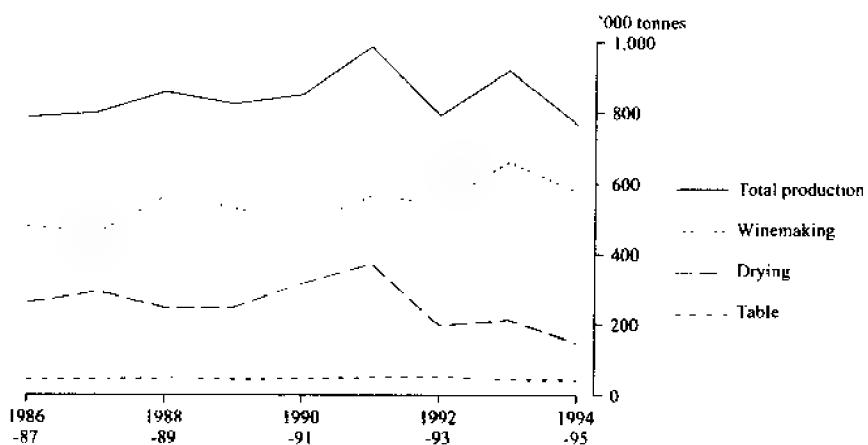
¹ Fresh weight.

INTENTIONS OF USE

In 1994-95, 575,001 tonnes of grapes produced were intended for winemaking, a decrease of 13% from 1993-94. The proportion of grapes intended for winemaking increased from 72% in 1993-94 to 75% in 1994-95. About 19% of grapes were intended for drying and 6% for table and other uses. These proportions vary year by year depending on demand for the competing uses and have changed over time. In the first three years of the 1970s the utilisation was 47% for winemaking, 50% for drying and 3% for table use. A number of the varieties grown are multipurpose, particularly the white varieties Sultana and Muscat Gordo Blanco. The demand for table grapes, while small, has doubled in the last twenty years.

All varieties of grape are used in winemaking while only four varieties, Sultana, Currant, Muscat Gordo Blanco and Waltham Cross are commonly used in drying. The principal table grape is Sultana although a range of other varieties are used.

GRAPE PRODUCTION AND INTENDED USAGE, AUSTRALIA



PRINCIPAL GRAPE PRODUCING REGIONS

In 1994-95, South Australia produced 55% of the grapes intended for winemaking. Of South Australian production, 97% was intended for winemaking. Half of Victoria's production was used for drying and table and other uses. Victoria produced 77% of Australia's grapes for drying and 60% of table and other grapes.

The regions which produced the most grapes intended for drying and table grapes were Sunraysia (Victoria), Sunraysia (New South Wales) and Kerang-Swan Hill. Sunraysia (Victoria), North Murray District and Murrumbidgee regions were the major white wine grape producing areas. South Australia produced 70% of Australia's red wine grapes in 1994-95, mostly in the South Eastern, North Murray and Central Districts.

The regions with the larger areas of vines planted or grafted during 1994-95 were Sunraysia (Victoria) and North Murray District for white grapes, and South Eastern and Barossa Districts for red grapes.

AREA AND PRODUCTION OF RED AND WHITE GRAPES BY PRINCIPAL GRAPE PRODUCING REGIONS, 1994-95

	Area of vines at harvest							
	Not yet bearing, planted or grafted				Grape production			
	Bearing	Prior to 1994-95	During 1994-95	Total	Wine- making	Drying	Table and other	Total
	hectares	hectares	hectares	hectares	tonnes ¹	tonnes ¹	tonnes ¹	tonnes ¹
NEW SOUTH WALES								
Hunter Valley								
Total red grapes	896	14	11	922	3 424	—	8	3 431
Total white grapes	1 694	77	165	1 936	8 430	—	1	8 430
Total grapes	2 590	91	177	2 858	11 854	—	8	11 862
Murrumbidgee								
Total red grapes	1 370	100	154	1 623	16 780	—	50	16 830
Total white grapes	3 067	218	255	3 541	41 287	—	30	41 317
Total grapes	4 437	318	409	5 164	58 067	—	80	58 147
Sunraysia (NSW)								
Total red grapes	395	38	53	487	2 214	1 192	2 029	5 436
Total white grapes	2 898	98	139	3 135	17 685	24 631	3 911	46 228
Total grapes	3 293	135	193	3 622	19 899	25 823	5 940	51 662
Rest of New South Wales								
Total red grapes	1 044	65	142	1 251	6 073	—	845	6 918
Total white grapes	1 306	119	170	1 595	9 034	—	1 566	10 601
Total grapes	2 351	184	312	2 846	15 108	—	2 411	17 519
Total New South Wales								
Total red grapes	3 706	216	361	4 283	28 491	1 192	2 931	32 615
Total white grapes	8 966	512	729	10 207	76 436	24 631	5 508	106 576
Total grapes	12 672	729	1 090	14 490	104 927	25 823	8 439	139 190
VICTORIA								
Sunraysia (Vic.)								
Total red grapes	1 167	108	197	1 472	6 353	5 912	3 045	15 311
Total white grapes	10 668	444	622	11 734	82 119	92 648	6 687	181 457
Total grapes	11 835	553	819	13 207	88 472	98 560	9 732	196 764
Kerang-Swan Hill								
Total red grapes	780	32	79	891	3 961	622	3 241	7 824
Total white grapes	3 253	95	142	3 490	21 681	13 946	13 705	49 332
Total grapes	4 032	128	221	4 381	25 642	14 568	16 946	57 155
Rest of Victoria								
Total red grapes	1 885	235	216	2 336	13 533	5	144	13 681
Total white grapes	1 265	179	253	1 696	10 301	260	79	10 640
Total grapes	3 150	413	469	4 032	23 834	265	223	24 321
Total Victoria								
Total red grapes	3 832	376	492	4 700	23 846	6 539	6 429	36 816
Total white grapes	15 186	718	1 017	16 921	114 101	106 853	20 471	241 429
Total grapes	19 018	1 094	1 509	21 621	137 948	113 392	26 900	278 240

For footnotes see end of table.

AREA AND PRODUCTION OF RED AND WHITE GRAPES BY PRINCIPAL GRAPE PRODUCING REGIONS, 1994-95 — *continued*

	Area of vines at harvest							
	Bearing	Not yet bearing, planted or grafted			Grape production			
		Prior to 1994-95	During 1994-95	Total	Wine- making	Drying	Table and other	Total
	hectares	hectares	hectares	hectares	tonnes ¹	tonnes ¹	tonnes ¹	tonnes ¹
QUEENSLAND								
Total Queensland								
Total red grapes	603	40	31	674	197	—	2 269	2 466
Total white grapes	291	46	40	376	183	—	1 254	1 437
Total grapes	894	85	71	1 050	380	—	3 523	3 903
SOUTH AUSTRALIA								
Central District								
Total red grapes	2 427	285	294	3 007	25 311	12	10	25 333
Total white grapes	1 307	96	100	1 503	14 814	—	—	14 814
Total grapes	3 734	381	395	4 510	40 125	12	10	40 147
Barossa District								
Total red grapes	3 074	226	386	3 686	18 645	3	1	18 648
Total white grapes	3 042	164	133	3 339	20 357	—	—	20 357
Total grapes	6 116	390	520	7 025	39 001	3	1	39 005
Wolseley and Lower Murray								
Total red grapes	918	93	142	1 153	14 752	399	29	15 180
Total white grapes	2 170	172	151	2 493	39 538	356	157	40 051
Total grapes	3 089	265	293	3 647	54 289	756	186	55 231
North Murray								
Total red grapes	1 930	213	227	2 370	26 096	2 767	465	29 328
Total white grapes	3 343	166	341	3 851	57 208	2 298	1 364	60 870
Total grapes	5 273	380	568	6 221	83 304	5 065	1 829	90 198
South Murray								
Total red grapes	720	172	88	979	12 434	438	204	13 076
Total white grapes	1 307	122	110	1 539	23 857	369	652	24 878
Total grapes	2 026	294	198	2 518	36 291	807	856	37 954
Northern								
Total red grapes	937	60	108	1 106	6 052	22	—	6 074
Total white grapes	1 084	21	78	1 183	7 962	37	30	8 029
Total grapes	2 021	81	187	2 289	14 014	59	30	14 103
South Eastern								
Total red grapes	3 012	276	710	3 998	31 175	—	—	31 175
Total white grapes	1 727	204	218	2 150	19 033	2	—	19 035
Total grapes	4 739	480	929	6 148	50 207	2	—	50 210
Total South Australia								
Total red grapes	13 017	1 325	1 957	16 299	134 464	3 641	709	138 814
Total white grapes	13 980	946	1 133	16 058	182 768	3 063	2 204	188 035
Total grapes	26 998	2 271	3 090	32 358	317 232	6 704	2 913	326 849

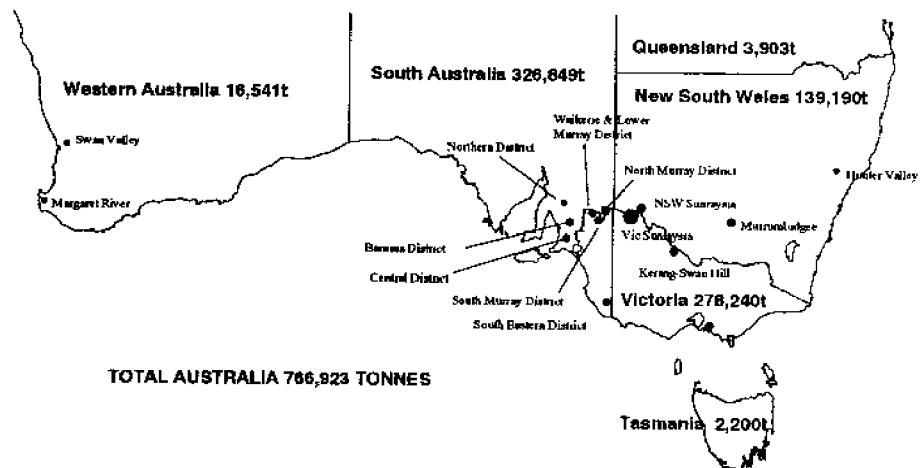
For footnotes see end of table.

AREA AND PRODUCTION OF RED AND WHITE GRAPES BY PRINCIPAL GRAPE PRODUCING REGIONS, 1994-95 — *continued*

	Area of vines at harvest			Grape production				Total	
	Bearing	Not yet bearing, planted or grafted		Total	Grape production		Table and other		
		Prior to 1994-95	During 1994-95		Wine- making	Drying			
	hectares	hectares	hectares	hectares	tonnes ¹	tonnes ¹	tonnes ¹	tonnes ¹	
WESTERN AUSTRALIA									
Swan Shire									
Total red grapes	325	12	2	339	818	518	1 142	2 478	
Total white grapes	297	17	19	332	1 491	132	1 143	2 760	
Total grapes	622	29	21	671	2 309	649	2 285	5 243	
Margaret River									
Total red grapes	255	26	15	296	1 431	—	70	1 501	
Total white grapes	339	55	56	449	1 830	—	14	1 843	
Total grapes	593	81	71	745	3 261	—	84	3 344	
Rest of Western Australia									
Total red grapes	601	54	23	678	2 993	619	277	3 889	
Total white grapes	599	34	61	694	3 751	219	95	4 064	
Total grapes	1 200	88	84	1 372	6 744	838	371	7 953	
Total Western Australia									
Total red grapes	1 181	91	40	1 312	5 242	1 137	1 489	7 868	
Total white grapes	1 235	106	135	1 475	7 072	350	1 252	8 667	
Total grapes	2 415	197	175	2 788	12 314	1 487	2 740	16 641	
TASMANIA									
Total Tasmania									
Total red grapes	159	32	12	203	1 210	—	—	1 210	
Total white grapes	134	35	27	197	990	—	—	990	
Total grapes	293	67	40	400	2 200	—	—	2 200	
AUSTRALIA									
Total Australia									
Total red grapes	22 498	2 080	2 893	27 471	193 450	12 509	13 827	219 789	
Total white grapes	39 792	2 362	3 081	46 234	381 650	134 897	30 689	547 134	
Total grapes	62 290	4 443	5 975	72 707	575 001	147 406	44 515	766 923	

¹ Fresh weight.

SELECTED GRAPE GROWING REGIONS OF AUSTRALIA



DRIED FRUIT PRODUCTION

Total dried fruit production in 1994-95 fell by 31% when compared with 1993-94. Sultanas contributed 86% to the fall in the total dried weight tonnage.

PRODUCTION OF DRIED GRAPES, AUSTRALIA, 1993-94 TO 1994-95

	Currents (incl. Carina)	Raisins	Sultanas	Total
	'000 tonnes ¹	'000 tonnes ¹	'000 tonnes ¹	'000 tonnes ¹
1993-94	5.1	1.7	40.4	47.3
1994-95	3.2	1.7	27.8	32.7

¹ Dried weight.

SECTION 3 STRUCTURE OF THE WINE MANUFACTURING INDUSTRY

NUMBER AND SIZE OF WINERIES

Wine commentators suggest there are about 800 wineries manufacturing, blending or selling wine in Australia. Many of these are very small establishments which do not crush grapes and have their wine made elsewhere. Those that crush grapes range in size from small family businesses without employees, producing a few thousand litres of wine, to large public corporations producing around 100 million litres.

For the 1995 vintage there were 238 locations around Australia which crushed 50 tonnes or more of grapes, owned by 202 enterprises. While all States crushed some grapes, South Australia has a third of all locations which crush half of the Australian total.

SIZE OF GRAPE CRUSH, NUMBER OF WINE PRODUCING LOCATIONS, STATES, AUSTRALIA, 1994-95

Grape crush size	Unit	NSW	Vic.	Qld	SA	WA	Tas.	Total
Grapes crushed	'000 t	186.5	109.4	n.p.	319.6	12.5	n.p.	629.8
Proportion	%	30	17	—	51	2	—	100
50 to 400 tonnes	no.	21	36	2	38	34	5	136
More than 400 tonnes	no.	25	21	—	45	9	2	102
Total	no.	46	57	2	83	43	7	238
Proportion	%	19	24	1	35	18	3	100

The table below gives details of the 202 enterprises crushing 50 or more tonnes of grapes. It shows that winemakers are diverse in size with the 105 smallest crushing less than 2% of grapes, averaging about 100 tonnes each, and the 6 largest crushing 54% of grapes and averaging about 56,000 tonnes each.

WINE PRODUCING ENTERPRISES, SIZE OF PRODUCTION, AUSTRALIA, 1994-95

Tonnes crushed	Enterprises no.	Grapes crushed tonnes	Beverage wine produced '000 litres
50 to 99	60	4 137	n.a.
100 to 149	28	3 380	n.a.
150 to 199	17	2 881	n.a.
200 to 400	26	7 172	n.a.
401 to 1 000	26	16 896	11 230
1 001 to 3 000	17	33 281	20 520
3 001 to 5 000	6	23 103	14 655
5 001 to 10 000	5	38 408	30 902
10 001 to 20 000	11	161 289	115 139
20 001 or more	6	339 286	265 957
Total	202	629 833	¹458 404

¹ Excludes production from those crushing less than 400 tonnes. This is estimated to be 12 million litres.

MANUFACTURING OPERATIONS

An alternative view of the wine manufacturing industry is available from the annual manufacturing industry collection which covers establishments mainly engaged in the manufacturing or blending of wine and which had some employment at 30 June. At 30 June 1993, there were an estimated 192 establishments employing 5,651 persons with a total turnover of \$1,186.8 million. These data do not include very small winemaking businesses run by sole proprietors and partnerships which do not employ other staff. The tables below show details from the 1992-93 collection.

WINE MANUFACTURING ESTABLISHMENTS, AUSTRALIA AND STATES, 1992-93, PRELIMINARY

	Establishments at 30 June no.	Employment at end of June no.	Wages and salaries \$m	Total sales of goods and transfers out \$m	Balance of turnover \$m	Turnover \$m
New South Wales	39	989	24.9	274.8	1.1	275.9
Victoria	48	1 190	29.7	290.9	0.9	291.8
Queensland	4	13	n.p.	n.p.	n.p.	n.p.
South Australia	67	2 890	76.4	552.1	4.4	556.5
Western Australia	32	563	9.9	58.8	1.1	59.9
Tasmania	3	6	n.p.	n.p.	n.p.	n.p.
Australia	192	5 651	141.3	1 179.1	7.8	1 186.8

Source: ABS Manufacturing Industry, 1992-93, Preliminary.

Of wine manufacturing establishments, 35% were located in South Australia, 25% in Victoria and 20% in New South Wales. South Australia also had 51% of total employment, 54% of total wages and salaries and 47% of total turnover. Victoria contributed 25% to total turnover, marginally ahead of New South Wales with 23%.

WINE MANUFACTURING ESTABLISHMENTS, AUSTRALIA AND STATES, 1992-93, PRELIMINARY

	Purchases and transfers in \$m	Selected expenses \$m	Opening stocks \$m	Closing stocks \$m	Value added \$m	Net capital expenditure \$m
New South Wales	157.4	15.2	94.4	99.2	108.1	10.4
Victoria	151.2	17.3	183.0	187.0	127.4	5.3
Queensland	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.
South Australia	235.4	32.2	326.3	348.3	310.8	17.1
Western Australia	27.1	4.4	26.9	31.6	33.1	3.8
Tasmania	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.
Australia	571.6	69.4	632.5	666.9	580.3	36.7

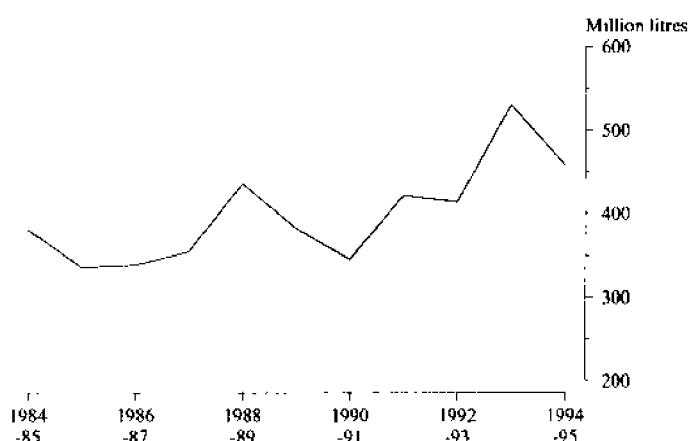
Source: ABS Manufacturing Industry, 1992-93, Preliminary.

SECTION 4 WINE PRODUCTION AND MATERIALS USED

PRODUCTION

Winemakers in Australia crushing more than 400 tonnes of fresh grapes reported the production of 458.4 million litres of beverage wine in 1994-95. While 14% down on the record volume of 530.5 million litres in 1993-94, it is the second highest production level recorded. In 1994-95 there was a fall of 13% in unfortified wine production to 433.0 million litres and a fall of 17% in fortified wine production to 25.4 million litres. This fall in production reflects the relatively poor vintage for 1995 reported elsewhere in this publication.

BEVERAGE WINE PRODUCTION, AUSTRALIA



WINE PRODUCTION, AUSTRALIA

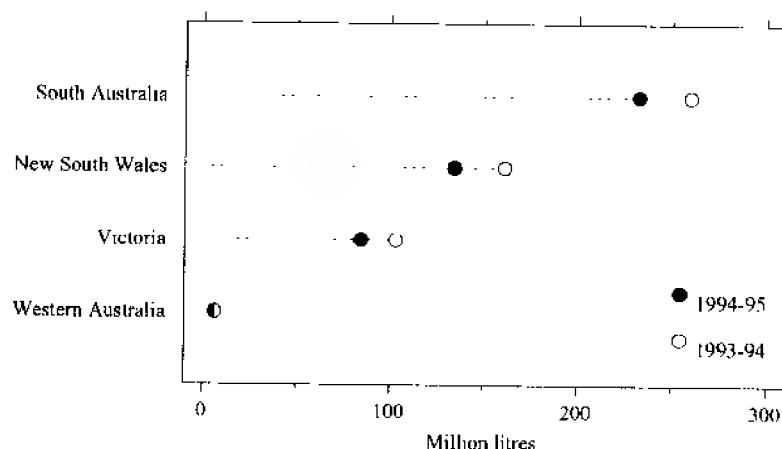
Type	1990-91 '000 L	1991-92 '000 L	1992-93 '000 L	1993-94 '000 L	1994-95 '000 L
Beverage wine:					
Fortified ¹	33 817	30 776	22 264	30 458	25 399
Unfortified	312 024	390 857	392 575	500 076	433 005
Total beverage wine	345 841	421 633	414 839	530 534	458 404
Distillation wine ²	54 068	59 138	46 998	56 842	44 393
Gross total wine	399 909	480 771	461 836	587 377	502 796
Net total wine ³	394 030	475 586	457 799	582 213	498 381

¹ Relates only to production from unfortified wine of the same vintage.
² For manufacturing brandy and grape spirit. Includes wine obtained from marc.
³ Excludes grape spirit used for fortifying (assumes 95.6% alcohol by volume).

STATE PRODUCTION

Beverage wine production in 1994-95 fell in all States with the exception of Western Australia which recorded no change in production. Production in South Australia fell by 11% to 232.3 million litres, in New South Wales by 17% to 134.3 million litres and in Victoria by 18% to 84.4 million litres.

BEVERAGE WINE PRODUCTION, STATES



Fortified wine production, which recorded a significant increase in 1993-94, fell 17% in 1994-95 continuing a steady decline since the record production of 68.4 million litres in 1974-75. South Australian producers contributed to most of this fall, down 5.4 million litres to 14.8 million litres. New South Wales also recorded a decrease of 2.5 million litres while in Victoria there was an increase in production of fortified wine by 91% to 6.0 million litres.

WINE PRODUCTION, AUSTRALIA AND STATES, 1994-95

Type	SA '000 L	NSW '000 L	VC. '000 L	WA '000 L	Tas. '000 L	Australia '000 L
Beverage wine:						
Fortified ¹	14 752	4 609	6 029	8	—	25 399
Unfortified	217 535	129 681	78 416	6 640	733	433 005
Total beverage wine	232 287	134 290	84 446	6 648	733	458 404
Distillation wine ²	32 660	5 314	6 419	—	—	44 393
Gross total wine	264 947	139 604	90 865	6 648	733	502 796
Net total wine ³	262 629	138 575	89 797	6 647	733	498 381

¹ Relates only to production from unfortified wine of the same vintage

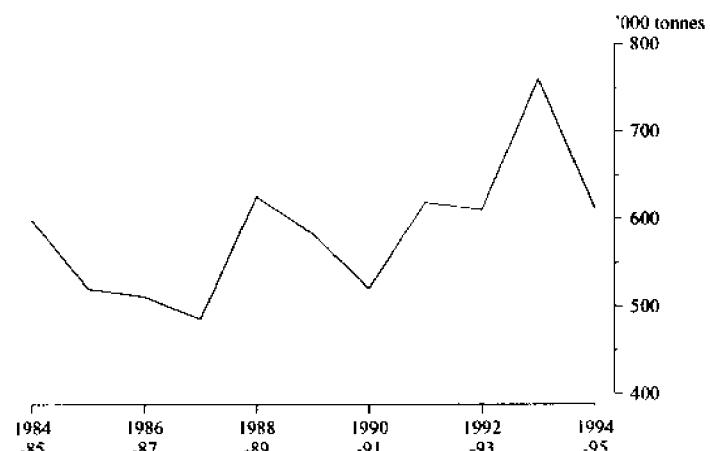
² For manufacturing brandy and grape spirit. Includes wine obtained from marc

³ Excludes grape spirit used for fortifying (assumes 95.6% alcohol by volume).

GRAPES CRUSHED

In 1994-95 there were 629,833 tonnes of grapes crushed by winemakers crushing 50 or more tonnes, a fall of 19% or 147,540 tonnes on the record 1993-94 crush. The larger winemakers (crushing more than 400 tonnes of fresh grapes) who report the wine production above, contributed 97% or 612,263 tonnes to the 1994-95 total.

FRESH GRAPES CRUSHED, AUSTRALIA



WINE GRAPE CRUSH, AUSTRALIA AND STATES

Fresh grapes crushed	1994-95				
	1992-93	1993-94	Red	White	Total
	tonnes	tonnes	tonnes	tonnes	tonnes
Enterprises crushing more than 400 tonnes:					
South Australia	282 185	384 666	118 906	194 865	313 771
New South Wales	227 356	235 943	41 165	142 071	183 236
Victoria	95 010	129 478	24 183	80 920	105 103
Western Australia	6 116	9 343	3 309	5 662	8 971
Tasmania	—	—	605	577	1 182
Australia	610 667	759 430	188 168	424 095	612 263
Enterprises crushing 50 to 400 tonnes:					
South Australia	4 533	5 358	3 778	2 025	5 803
New South Wales	3 070	3 261	1 440	1 835	3 275
Victoria	3 096	4 068	2 222	2 038	4 260
Western Australia	3 879	4 254	1 732	1 794	3 526
Tasmania	654	n.p.	n.p.	n.p.	n.p.
Queensland	288	n.p.	n.p.	n.p.	n.p.
Australia	15 520	17 943	9 587	7 983	17 570
Total all enterprises crushing 50 tonnes or more:					
South Australia	286 718	390 024	122 684	196 890	319 574
New South Wales	230 426	239 204	42 605	143 906	186 511
Victoria	98 106	133 546	26 405	82 958	109 363
Western Australia	9 995	13 597	5 041	7 456	12 497
Tasmania	654	n.p.	n.p.	n.p.	n.p.
Queensland	288	n.p.	n.p.	n.p.	n.p.
Australia	626 187	777 373	197 755	432 078	629 833

Just over half of all grapes crushed in 1994-95 were by South Australian wineries although there was a reduction of 18% or 70,450 tonnes in the 1994-95 crush. Grapes crushed in New South Wales and Victoria fell by 22% and 18% respectively while Western Australia fell 8% on the crush reported for 1993-94.

Of the total crush of 629,833 tonnes there were 197,755 tonnes of red grapes (31%) and 432,078 tonnes of white grapes (69%). While the larger enterprises (those crushing more than 400 tonnes) reflected these proportions, the small enterprises (crushing between 50 and 400 tonnes) crushed more red grapes (55%) than white (45%).

In using data on quantities of grapes processed and quantities of wine made by States shown in this section it should be noted that there is interstate movement of unfermented grape juice. Data should be used with some caution.

GRAPE SPIRIT USE

The grape spirit used in fortifying current vintage wine is presented in the table below and year to year movements generally mirror those of fortified wine production.

GRAPE SPIRIT USED IN CURRENT VINTAGE WINE

	1990-91 '000 L al	1991-92 '000 L al	1992-93 '000 L al	1993-94 '000 L al	1994-95 '000 L al
South Australia	2 405	1 711	1 320	2 979	2 215
New South Wales	2 079	2 292	1 929	1 462	984
Victoria	1 134	953	610	492	1 021
Other States	1	—	—	2	1
Australia	5 620	4 957	3 860	4 936	4 221

SECTION 5 REGIONAL SUMMARY

Up to 30 major winemaking areas have been identified in Australia. Many contain small or boutique wineries. While grape growing data are available for smaller areas (vines are cultivated in more than 260 local government areas across Australia) the following table contains details of regions for which comprehensive statistical information is often available.

Regions may obtain some of their grape supply from outside their area, for example grapes crushed by Barossa Valley wineries may also be sourced from the South Australian Riverland while New South Wales wineries may also source from Victorian Sunraysia and the South Australian Riverland.

AREA OF VINES, GRAPE PRODUCTION, GRAPES CRUSHED, WINE PRODUCED, AUSTRALIA, 1994-95

Region	Area of vines at harvest		Grape production		Grapes crushed ¹	Beverage wine production ¹
	Bearing	Not yet bearing	Wine-making	Other		
	hectares	hectares	tonnes	tonnes	tonnes	'000 litres
Central District	3 734	776	40 125	22	31 876	24 202
Barossa District	6 116	910	39 001	4	99 628	101 276
Riverland	10 388	1 998	173 884	9 499	137 031	80 949
Northern District	2 021	268	14 014	89	9 196	6 255
South Eastern District	4 739	1 409	50 207	2	36 040	19 604
<i>Total South Australia</i>	<i>26 998</i>	<i>5 361</i>	<i>317 232</i>	<i>9 617</i>	<i>313 771</i>	<i>232 287</i>
Murrumbidgee	4 437	727	58 067	80	96 221	76 126
Hunter Valley	2 590	268	11 854	8)	
Sunraysia (NSW)	3 293	328	19 899	31 763)	87 015
Other New South Wales	2 351	496	15 108	2 411)	58 164
<i>Total New South Wales</i>	<i>12 672</i>	<i>1 819</i>	<i>104 927</i>	<i>34 262</i>	<i>183 236</i>	<i>134 290</i>
Sunraysia (Vic.)	11 835	1 372	88 472	108 292)	
Kerang-Swan Hill	4 032	349	25 642	31 514)	
Other Victoria	3 150	882	23 834	488)	
<i>Total Victoria</i>	<i>19 018</i>	<i>2 603</i>	<i>137 948</i>	<i>140 292</i>	<i>105 103</i>	<i>84 446</i>
Swan Shire	622	50	2 309	2 934)	
Margaret River	593	152	3 261	84)	
Other Western Australia	1 200	172	6 744	1 209)	
<i>Total Western Australia</i>	<i>2 415</i>	<i>372</i>	<i>12 314</i>	<i>4 227</i>	<i>8 971</i>	<i>6 648</i>
<i>Total Queensland</i>	<i>894</i>	<i>156</i>	<i>380</i>	<i>3 523</i>	<i>n.a.</i>	<i>n.a.</i>
<i>Total Tasmania</i>	<i>293</i>	<i>107</i>	<i>2 200</i>	<i>—</i>	<i>1 182</i>	<i>733</i>
<i>Total Australia</i>	<i>62 290</i>	<i>10 418</i>	<i>575 001</i>	<i>191 921</i>	<i>612 263</i>	<i>458 404</i>

¹ Winemakers crushing more than 400 tonnes

The top three wine regions in terms of volume of wine produced are the Barossa and Riverland regions in South Australia and the Murrumbidgee region in New South Wales.

SECTION 6 WINE STOCKS

Stocks of Australian beverage wine held by winemakers at 30 June 1995 were 642.5 million litres, a decrease of 2% or 14.2 million litres when compared with the record levels of 30 June 1994. This fall in wine stocks is against the general trend of growth in wine stocks evident since 1988 and reflects the continued high total sales of Australian wine and the poor 1995 vintage outlined in Sections 2 and 4.

STOCKS OF AUSTRALIAN WINE AND UNFERMENTED GRAPE JUICE HELD BY WINEMAKERS

	1991 '000 L	1992 '000 L	1993 '000 L	1994 '000 L	1995 '000 L
Stocks at 30 June					
Beverage wine:					
Fortified;					
Dry sherry	8 819	7 787	7 202	7 183	6 870
Medium sherry ¹	1 381	2 055	2 144	1 662	1 487
Sweet sherry	20 982	19 912	19 067	16 756	15 784
Port	58 496	58 275	55 346	55 132	53 768
Muscat	4 606	4 911	4 658	4 566	4 008
Other ²	1 675	1 936	1 611	1 710	1 707
<i>Total fortified wine</i>	<i>95 958</i>	<i>94 877</i>	<i>90 028</i>	<i>87 009</i>	<i>83 623</i>
Sparkling wine, ³					
Bottle fermentation	53 297	50 480	54 590	59 860	58 335
Bulk fermentation	4 729	3 639	2 420	1 940	1 847
<i>Total sparkling wines</i>	<i>58 026</i>	<i>54 120</i>	<i>57 009</i>	<i>61 800</i>	<i>60 182</i>
Carbonated					
Flavoured ⁴	n.p.	n.p.	1 034	1 051	n.p.
	1 677	3 240	1 947	2 189	2 583
Vermouth;					
Dry	n.p.	n.p.	311	201	n.p.
Sweet	n.p.	n.p.	287	360	n.p.
<i>Total vermouth</i>	<i>n.p.</i>	<i>n.p.</i>	<i>598</i>	<i>561</i>	<i>n.p.</i>
Table wine;					
White;					
Not exceeding 1° Baumé	240 892	251 482	245 900	298 737	272 186
Exceeding 1° Baumé	13 733	18 357	7 862	8 973	9 567
Red	160 677	173 733	178 619	194 513	209 485
Rosé	4 737	6 530	4 443	1 872	2 448
<i>Total table wine</i>	<i>420 039</i>	<i>450 103</i>	<i>436 823</i>	<i>450 095</i>	<i>493 685</i>
Total beverage wine	585 208	604 014	587 441	656 706	642 459
Distillation wine	935	593	343	427	753
Unfermented grape juice;					
Unfermented grape juice	9 372	12 622	9 686	16 228	13 329
Concentrated must (single strength)	2 605	2 434	n.p.	4 270	n.p.

¹ Includes semi-sweet and medium dry.

² Includes madeira, tokay and white port.

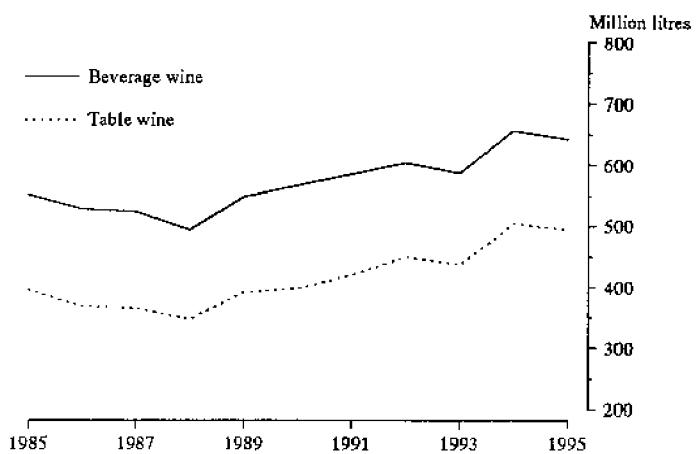
³ Spritzing wines are included with table wines.

⁴ Includes wine cocktails marsala, aperitif and tonic wines.

WINE TYPES

Nearly 77% of all beverage wine stocks were table wine and 13% were fortified wine while most of the remaining wine stocks were sparkling wine. Table wine stocks fell by 2% to 493.7 million litres in 1995. Within this category, dry white wine stocks fell by 9%, sweet white wine increased by 7%, red wine by 8% and stocks of rosé by 31%. Sparkling wine stocks fell by 3% with bottle fermented stocks and bulk fermented stocks falling by 3% and 5% respectively. Total fortified wine stocks fell by 4%, continuing the decline in stocks of this type of wine for the last five years. Port wine represented approximately two thirds of total fortified wine stocks.

STOCKS OF AUSTRALIAN WINE AT 30 JUNE

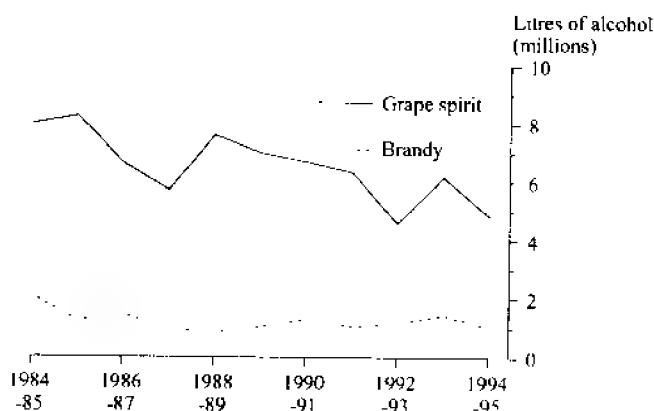


SECTION 7 BRANDY AND GRAPE SPIRIT

PRODUCTION

In 1994-95 production of brandy in Australia fell by 29% to 1.0 million litres of alcohol, the lowest production level since 1988-89. Grape spirit production also fell in 1994-95 by 21% to 4.9 million litres of alcohol. This follows a declining trend in the production of grape spirit since 1988-89, except for the increase recorded in 1993-94. South Australia was the main producer of both these products with 90% (0.9 million litres of alcohol) of all brandy made and over two-thirds of all grape spirit made.

BRANDY AND GRAPE SPIRIT PRODUCTION, AUSTRALIA



STOCKS

Total stocks of brandy in bond fell 9% in 1994-95 when compared with 1993-94. Stocks of rectified grape spirit and grape spirit unused fell for the third year in a row, as did spirit held in work in progress.

STOCKS OF AUSTRALIAN BRANDY AND GRAPE SPIRIT

Particulars at 30 June	1991 '000 Lal	1992 '000 Lal	1993 '000 Lal	1994 '000 Lal	1995 '000 Lal
Brandy in bond by age:					
Under 1 year	1 361	1 143	1 307	1 560	1 323
1 year and under 2	1 409	1 602	1 268	1 607	1 189
2 years and under 3	1 068	1 348	1 727	1 385	1 476
3 years and over	1 974	1 331	883	1 090	1 164
Total brandy in bond	5 812	5 424	5 185	5 641	5 151
Rectified grape spirit for fortifying wine and grape spirit unused	3 378	3 748	3 577	3 370	3 012
Spirit held in work in progress (feints and low wine)	779	944	815	812	685

BRANDY AND SPIRIT SALES

Domestic sales of Australian brandy continued to decline in 1994-95, down 9% on 1993-94 and extends an unbroken downward trend since 1980-81. Exports of Australian brandy are relatively small and tend to fluctuate from year to year. In 1994-95, 95% of these exports originated from South Australia, compared with 86% in 1993-94.

The volume of imported brandy cleared for home consumption fell 7% in 1994-95 after remaining steady over the last few financial years. In 1994-95, 96% of brandy imports originated from France.

DOMESTIC SALES, IMPORTS AND EXPORTS OF BRANDY

	1990-91 '000 Lal	1991-92 '000 Lal	1992-93 '000 Lal	1993-94 '000 Lal	1994-95 '000 Lal
Australian brandy:					
Domestic sales	1 444	1 380	1 312	1 301	1 188
Exports	39	74	73	36	36
Imported brandy	636	662	629	634	590

Source: ABS, *Sales of Australian Wine and Brandy by Winemakers* (8504.0).

Australia exported 4,416 litres of alcohol in grape spirit for 1994-95. Victoria exported 69% of this total while South Australia contributed 25%.

Australia imported 6,895 litres of alcohol in grape spirit for 1994-95. The two main source countries were Turkey (2,167 litres of alcohol) and Italy (1,974 litres of alcohol).

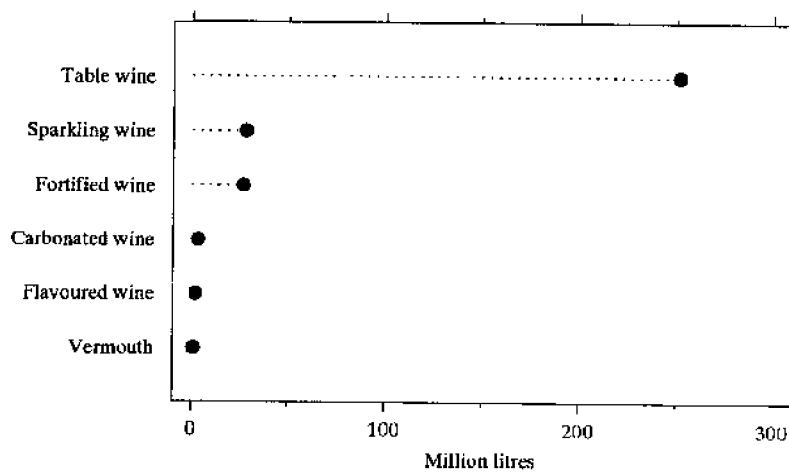
SECTION 8 DOMESTIC WINE SALES

Information on the volume of domestic sales of Australian wine is obtained from approximately 50 winemaking enterprises which have annual sales of at least 250,000 litres of wine. These account for around 97% of total wine sales by winemakers.

WINE TYPES

In 1994-95, 313.4 million litres of Australian wine were sold by winemakers, a decrease of 2% from the previous year and 5% below the record 330.5 million litres in 1987-88. The type of wine with the largest volume of sales was table wine with 251.6 million litres followed by sparkling wine at 28.0 million litres.

DOMESTIC SALES OF AUSTRALIAN WINE BY WINEMAKERS, WINE TYPE, 1994-95



Source: ABS, *Sales of Australian Wine and Brandy by Winemakers (8504.0)*

In the period since 1985-86, changes in consumer preference have emerged. While relatively small changes in sales were recorded in total wine (down 4%) and total table wine (down 1%), the various categories of table wine in particular have recorded more significant movements. Sales of white table wine have decreased by 22.6 million litres (11%) while sales of red table wine have increased by 23.4 million litres (63%). Sales of red wine were 24% of table wine sales in 1994-95, up from 15% in 1985-86.

DOMESTIC SALES OF AUSTRALIAN WINE BY WINEMAKERS, 1985-86 TO 1994-95

Year	Table				Sparkling				
	White	Red	Rosé	Fortified	Bottle fermented	Bulk fermented	Vermouth	Other	Total
Year	million litres	million litres	million litres	million litres	million litres	million litres	million litres	million litres	million litres
1985-86	208.7	37.2	7.1	36.8	17.7	11.3	3.0	3.4	325.2
1986-87	210.8	40.1	7.2	36.2	20.6	8.2	2.8	3.9	329.8
1987-88	204.2	44.4	7.2	35.1	25.0	7.6	2.7	4.4	330.5
1988-89	186.7	44.0	7.1	33.3	25.3	6.3	2.2	4.3	309.1
1989-90	180.4	43.0	6.5	33.1	25.6	5.6	1.9	4.5	300.6
1990-91	176.2	46.2	6.0	30.7	25.7	3.7	1.6	6.1	296.3
1991-92	190.2	50.8	5.7	29.9	25.4	4.7	1.4	6.7	314.8
1992-93	186.4	55.1	4.9	28.4	25.3	4.7	1.3	6.1	312.1
1993-94	192.5	57.4	4.9	27.0	26.3	4.2	1.3	6.0	319.5
1994-95	186.2	60.6	4.8	27.0	23.6	4.4	1.1	5.7	313.4

Source: ABS, *Sales of Australian Wine and Brandy by Winemakers* (8504.0).

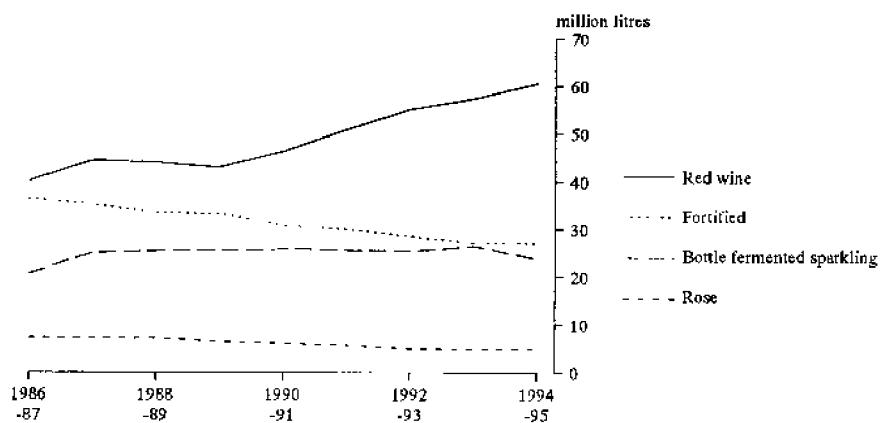
DOMESTIC SALES OF AUSTRALIAN TABLE WINE BY CONTAINER TYPE, 1985-86 TO 1994-95

Year	Glass containers 1 litre and under			Soft pack			Other containers		
	White	Red	Rosé	White	Red	Rosé	White	Red	Rosé
Year	million litres	million litres	million litres	million litres	million litres	million litres	million litres	million litres	million litres
1985-86	38.9	16.8	1.0	140.8	16.9	5.2	29.1	3.4	0.9
1986-87	41.7	19.0	1.1	138.8	17.7	5.4	30.4	3.5	0.6
1987-88	42.6	22.1	1.1	138.2	19.0	5.6	23.4	3.2	0.5
1988-89	46.1	22.9	1.1	124.7	18.2	5.6	15.9	2.9	0.4
1989-90	45.5	22.9	1.0	122.8	18.2	5.3	12.2	1.9	0.3
1990-91	42.9	23.2	0.9	123.4	21.2	4.8	9.9	1.8	0.2
1991-92	43.5	24.0	0.8	138.1	25.2	4.8	8.6	1.5	0.2
1992-93	44.1	25.3	n.p.	135.9	28.7	4.1	6.4	1.1	n.p.
1993-94	48.1	27.6	0.6	137.8	28.4	4.2	6.6	1.4	0.1
1994-95	51.9	30.0	0.6	129.3	29.5	4.1	5.0	1.2	0.1

Source: ABS, *Sales of Australian Wine and Brandy by Winemakers* (8504.0).

Decreases were recorded between 1985-86 and 1994-95 in sales of rosé table wine (down 33%), fortified wine (down 27%), sparkling wine (down 3%) and vermouth (down 63%) while increases have occurred in sales of carbonated wine (up 132%) and flavoured wines (up 16%). A substantial change has occurred for sparkling wines with the share of bottle fermented sales rising from 61% of all sparkling wine sold in 1985-86 to 84% in 1994-95.

DOMESTIC SALES OF AUSTRALIAN WINE BY WINEMAKERS, SELECTED WINE TYPES

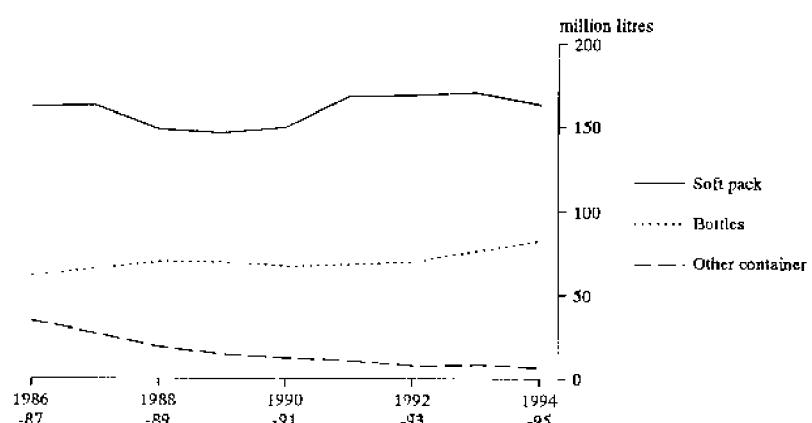


Source: ABS, *Sales of Australian Wine and Brandy by Winemakers* (8504.0)

CONTAINER TYPE

In 1994-95, sales of table wine in bottles increased from the previous year's 76.3 million litres to 82.4 million litres. Soft pack sales decreased to 162.9 million litres and wine sold in glass containers over 1 litre and bulk containers decreased to 6.3 million litres. The annual movements for the 1994-95 year continued the trends evident since 1985-86.

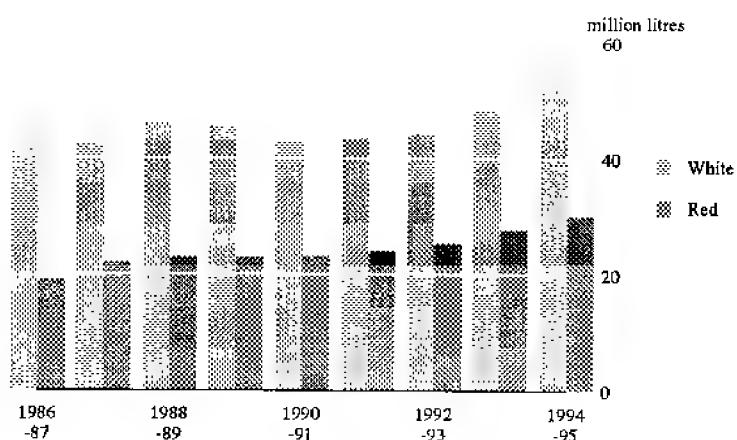
DOMESTIC SALES OF AUSTRALIAN TABLE WINE BY CONTAINER TYPE



Source: ABS, *Sales of Australian Wine and Brandy by Winemakers* (8504.0)

The proportion of table wine sold in both soft packs and glass bottles has increased since 1985-86 with soft pack sales rising from 64% to 65% and bottle sales up from 22% to 33% in 1994-95. Both bottles and casks increased at the expense of wine in other containers which decreased from 13% to 2% in 1994-95.

DOMESTIC SALES OF AUSTRALIAN RED AND WHITE TABLE WINE IN BOTTLES



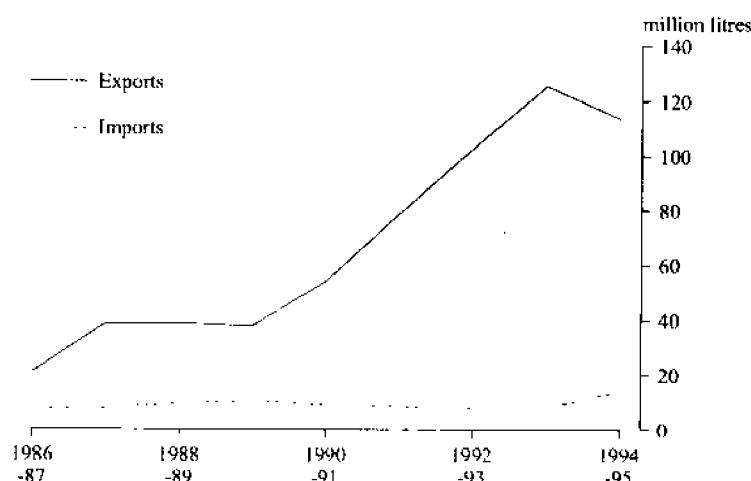
Source: ABS, *Sales of Australian Wine and Brandy by Winemakers (8504.0)*

The movements in both bottle and casks sales have not been evenly distributed for each table wine category. Although total white wine sales have fallen from 1985-86 to 1994-95, bottled white wine has increased by 13.0 million litres or 33%. Similarly, despite soft pack sales falling slightly in this period, red wine in soft pack has increased by 12.5 million litres or 74%. Sales of rosé have decreased for all container types.

SECTION 9 OVERSEAS TRADE

Australia's trade in wine has risen substantially since the mid 1980s. Exports of Australian made wine totalled 8.9 million litres in 1985-86 and were only 8.7 million litres in 1984-85. They have since risen dramatically to record over one hundred million litres in the past few years. Imports grew from under one million litres in the mid 1960s before peaking in the mid 1980s at 12 million litres. Since then imports have settled to a level of around 8 million litres, until 1994-95 when a record 14.1 million litres were imported. 1985-86 was the last year in which the volume of wine imported was greater than the volume exported.

IMPORTS AND EXPORTS OF AUSTRALIAN WINE



Source: ABS, *Sales of Australian Wine and Brandy by Winemakers* (8504.0)

EXPORTS OF WINE

Australia exported 113.6 million litres of wine in 1994-95, a fall of 9% on the record 125.5 million litres recorded for 1993-94. However, the value of wine exported continued to increase reaching a record high of \$385.3 million in 1994-95, up 5% on 1993-94. The average price of these exports was \$3.39 per litre in 1994-95, up from \$2.92 in 1993-94.

EXPORTS OF AUSTRALIAN WINE, 1985-86 TO 1994-95

	Wine type				Total wine	
	Table		Fortified	Sparkling	Other	Quantity
	'000 L	'000 L	'000 L	'000 L	'000 L	\$'000
1985-86	9 227	894	433	287	10 842	20 541
1986-87	18 627	1 232	826	638	21 324	44 620
1987-88	35 022	1 411	1 603	1 088	39 124	96 157
1988-89	35 873	1 106	1 764	301	39 044	114 521
1989-90	32 095	1 936	2 074	2 015	38 120	121 248
1990-91	46 890	2 765	3 180	1 321	54 156	179 588
1991-92	71 752	2 384	3 904	639	78 679	243 526
1992-93	95 468	1 851	4 730	784	102 832	293 157
1993-94	116 655	2 873	5 042	893	125 464	366 574
1994-95	105 458	2 475	5 109	529	113 570	385 340

Source: ABS, *Sales of Australian Wine and Brandy by Winemakers*, September 1995 (8504.0)

Table wine was the predominant wine exported with 105.5 million litres in 1994-95 representing almost 93% of the total volume. The 5.1 million litres of sparkling wine exported, while relatively small, has grown at a similar rate as table wine. Exports of fortified wine have shown growth but are small in comparison with only 2.5 million litres exported in 1994-95.

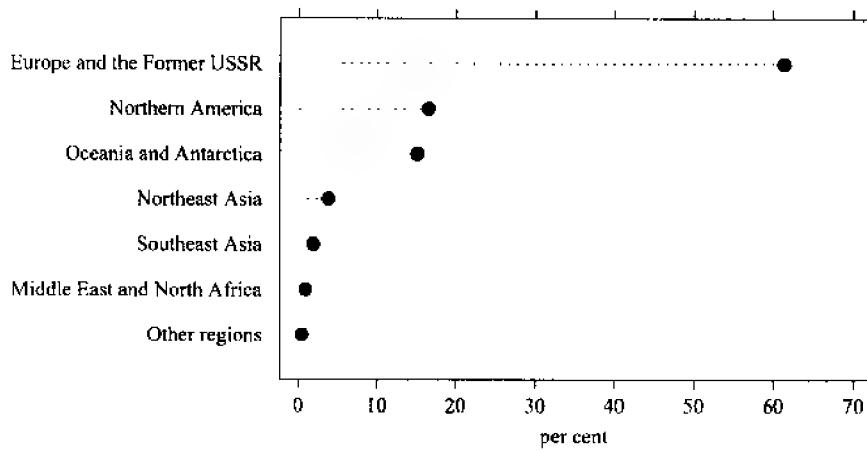
COUNTRY OF DESTINATION

The European Union is the main market for Australian wine taking 62.9 million litres valued at \$226.8 million, representing 59% of the total volume exported in 1994-95 and 96% of total Europe and former USSR. Shares of other regions are: Oceania and Antarctica 15%, Northern America 17% and Northeast Asia 4%.

The United Kingdom was the largest importing country of Australian wine with 51.4 million litres valued at \$183.8 million, followed by New Zealand, the United States of America and Sweden. Australia's largest market for sparkling wine was the United Kingdom (60% of exports) and for fortified wine, it was New Zealand (33% of exports).

DESTINATION OF AUSTRALIAN WINE EXPORTS, 1994-95

Proportion of total



Source: ABS, *Sales of Australian Wine and Brandy by Winemakers (8504.0)*

EXPORTS OF AUSTRALIAN WINE BY DESTINATION, 1994-95

Principal country/region	Wine type				Total wine	
	Table '000L	Fortified '000L	Sparkling '000L	Other '000L	Quantity '000L	Value \$'000
New Zealand	13 939	826	631	168	15 564	33 198
<i>Total Oceania & Antarctica¹</i>	<i>15 272</i>	<i>886</i>	<i>797</i>	<i>180</i>	<i>17 134</i>	<i>38 241</i>
Germany	1 691	8	16	3	1 718	6 428
Ireland	2 380	—	34	—	2 414	8 025
Netherlands	1 319	8	2	1	1 329	5 365
Sweden	7 290	—	79	—	7 369	14 406
United Kingdom	47 626	590	3 047	90	51 354	183 757
<i>Total European Union¹</i>	<i>62 930</i>	<i>610</i>	<i>3 217</i>	<i>94</i>	<i>66 852</i>	<i>226 828</i>
Switzerland	888	3	39	27	957	5 502
<i>Total Europe and the CIS¹</i>	<i>65 569</i>	<i>616</i>	<i>3 396</i>	<i>124</i>	<i>69 706</i>	<i>236 258</i>
<i>Total Middle East and North Africa¹</i>	<i>947</i>	<i>5</i>	<i>55</i>	<i>8</i>	<i>1 014</i>	<i>1 860</i>
<i>Total Southeast Asia¹</i>	<i>1 966</i>	<i>16</i>	<i>129</i>	<i>85</i>	<i>2 196</i>	<i>7 923</i>
Hong Kong	761	21	246	26	1 054	5 659
Japan	1 802	186	258	64	2 310	8 215
<i>Total Northeast Asia¹</i>	<i>3 418</i>	<i>230</i>	<i>549</i>	<i>109</i>	<i>4 306</i>	<i>16 346</i>
Canada	5 046	497	62	10	5 615	19 965
USA	12 848	193	94	12	13 147	63 000
<i>Total Northern America¹</i>	<i>17 912</i>	<i>690</i>	<i>156</i>	<i>21</i>	<i>18 779</i>	<i>83 041</i>
<i>Total other regions²</i>	<i>374</i>	<i>32</i>	<i>26</i>	<i>2</i>	<i>434</i>	<i>1 671</i>
Total all countries	105 458	2 475	5 109	529	113 570	385 340

¹ Includes other countries.

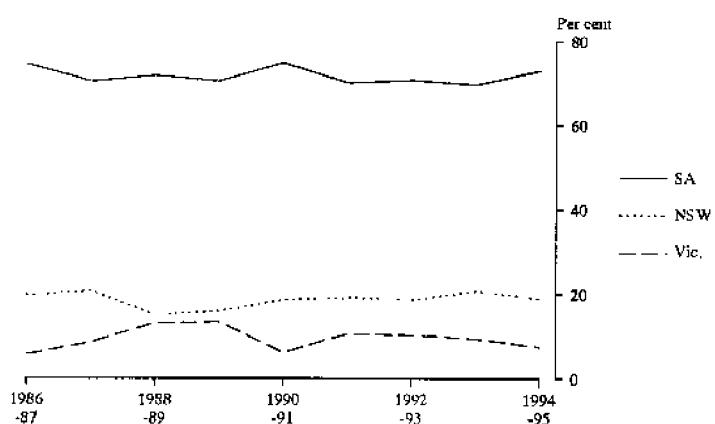
² Includes ships' stores.

Source: ABS, *Sales of Australian Wine and Brandy by Winemakers* (8504.0).

STATE OF ORIGIN OF EXPORTS

South Australia is the predominant source of Australian wine exports supplying 82.8 million litres in 1994-95 which represents 73% of total exports. Next were New South Wales with 21.5 million litres (19%) and Victoria 8.6 million litres (8%). State shares of exports have been similar over the last ten years. Average prices of wine exported were \$3.02 for South Australia, \$3.68 for New South Wales and \$5.91 for Victoria.

AUSTRALIAN WINE EXPORTS BY STATE OF ORIGIN
Proportion of total wine exports



Source: ABS, *Sales of Australian Wine and Brandy by Winemakers* (8504.0)

EXPORTS OF AUSTRALIAN WINE BY STATE OF ORIGIN

	NSW	Vic.	Qld	SA	WA	Tas.	NT and ACT	Aust. total
	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L
1985-86	1 777	857	4	8 127	59	4	—	10 830
1986-87	4 194	1 211	1	15 842	75	—	—	21 323
1987-88	7 872	3 253	30	26 815	184	8	—	38 161
1988-89	5 870	5 081	2	27 990	100	1	—	390 944
1989-90	6 053	5 123	12	26 829	89	14	1	38 120
1990-91	10 088	3 387	10	40 487	194	11	20	54 197
1991-92	15 004	8 271	3	55 122	241	34	5	78 680
1992-93	19 225	10 481	51	72 605	445	20	5	102 832
1993-94	25 825	11 629	40	87 370	547	31	21	125 464
1994-95								
Quantity	21 465	8 573	3	82 774	722	31	2	113 570
Value (\$'000)	78 911	50 659	36	250 369	5 065	296	5	385 340

Source: ABS, *Sales of Australian Wine and Brandy by Winemakers*, September 1995 (8504.0).

IMPORTS OF WINE

Imports of wine into Australia reached a record high in 1994-95 at 14.1 million litres, an increase of 69% from the previous year. This increase was mostly attributed to the imports of table wine which more than doubled. The average price of the imports fell from \$5.71 in 1993-94 to \$4.34 per litre.

WINE IMPORTS CLEARED FOR HOME CONSUMPTION BY WINE TYPE

	Wine type				Total wine	
	Table	Fortified	Sparkling	Other	Quantity	Value
					'000 L	'000 L
1985-86	8 546	333	3 044	436	12 359	46 410
1986-87	5 106	205	1 967	389	7 667	37 585
1987-88	5 302	178	2 031	635	8 146	41 358
1988-89	6 086	311	2 264	1 076	9 737	46 871
1989-90	6 595	184	2 736	937	10 453	52 692
1990-91	5 604	191	2 285	919	8 999	46 779
1991-92	5 190	160	2 373	979	8 703	45 649
1992-93	4 833	106	2 346	546	7 832	46 984
1993-94	4 432	152	2 301	1 456	8 341	47 637
1994-95	9 398	272	3 065	1 322	14 057	61 057

Source: ABS, *Sales of Australian Wine and Brandy by Winemakers*, September 1995 (8504.0).

In 1994-95, two-thirds of all wine imported was table wine and 22% was sparkling wine. Nearly 38% of wine imports came from Italy, with France supplying a further 21%, the United States of America 15% and New Zealand 6%.

FRESH AND DRIED GRAPES

Over the period since 1985-86 the quantities of grapes imported and exported have varied considerably.

In 1994-95, Australia exported 14,681 tonnes of dried grapes valued at \$29.6 million. This was a decrease in volume of 64% from the 41,087 tonnes exported in 1993-94 and 40% lower than the previous lowest figure of 36,386 tonnes exported in 1990-91. Imports of dried grapes measured 7,369 tonnes valued at \$9.1 million in 1994-95. This was an increase of 56% over the 1993-94 figure of 4,725 tonnes, but still 24% below the figure of 9,681 tonnes reported in 1991-92.

IMPORTS AND EXPORTS OF FRESH AND DRIED GRAPES

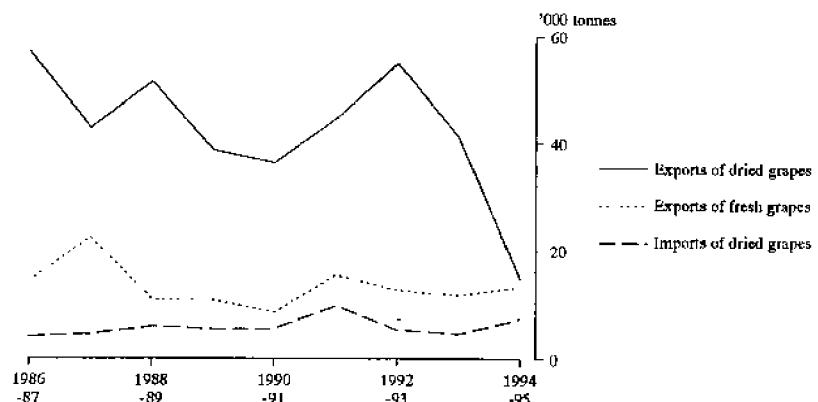
	Fresh grapes				Dried grapes			
	Exports		Imports		Exports		Imports	
	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value
	tonnes	\$'000	tonnes	\$'000	tonnes	\$'000	tonnes	\$'000
1985-86	8 693	15 336	—	—	51 433	71 499	2 453	3 343
1986-87	14 228	25 516	31	53	57 041	96 798	484	5 784
1987-88	22 390	42 374	2	3	42 824	78 087	4 749	6 692
1988-89	10 943	21 159	53	87	51 496	88 226	6 046	7 174
1989-90	10 680	21 434	—	—	38 794	69 056	5 475	7 296
1990-91	8 473	20 794	—	—	36 386	74 156	5 683	8 027
1991-92	15 408	36 102	14	18	44 592	82 886	9 681	13 800
1992-93	12 621	31 513	—	—	55 047	96 927	5 335	7 429
1993-94	11 702	28 695	7	8	41 087	73 337	4 725	6 070
1994-95	13 340	32 249	2	12	14 681	29 640	7 369	9 090

Source: ABS, *International Merchandise Trade, Australia* (5422.0).

Australia exported 13,340 tonnes of fresh grapes in 1994-95, an increase of 14% compared with 1993-94, but still lower than the peak of 22,390 tonnes exported in 1987-88. The value of the fresh grapes exported in 1994-95 was \$32.2 million and exceeded the value of dried grapes exported for the first time in this ten year period.

Fresh grapes are imported sporadically with 109 tonnes imported over the last ten years.

OVERSEAS TRADE OF FRESH AND DRIED GRAPES



Source: ABS, *International Merchandise Trade, Australia* (5422.0)

Over the last three years, Australia's largest markets for fresh grapes were Indonesia, Singapore and Hong Kong. The main markets for dried grapes were the United Kingdom, Germany and New Zealand. Two thirds of imported dried grapes were from Turkey in 1993-94 and 1994-95.

EXPORTS AND IMPORTS OF FRESH AND DRIED GRAPES BY COUNTRY

	1992-93		1993-94		1994-95	
	Quantity	Value	Quantity	Value	Quantity	Value
	tonnes	\$'000	tonnes	\$'000	tonnes	\$'000
Exports of fresh grapes:						
Indonesia	3 620	8 097	2 528	5 406	4 057	8 582
Singapore	2 759	7 676	2 608	6 888	2 954	7 984
Hong Kong	1 279	3 030	2 033	6 040	1 801	5 177
Malaysia	1 078	2 495	1 804	3 974	1 832	4 339
New Zealand	817	2 093	908	2 220	1 127	2 501
Other countries	3 067	8 122	1 822	4 167	1 570	3 686
Total	12 621	31 513	11 702	28 695	13 340	32 249
Imports of fresh grapes:						
New Zealand	—	—	—	—	2	12
Indonesia	—	—	7	8	—	—
Total	—	—	7	8	2	12
Exports of dried grapes:						
United Kingdom	8 882	17 407	7 172	14 068	4 000	7 880
Germany	21 480	39 973	15 974	30 432	3 647	7 688
New Zealand	5 228	8 778	4 797	7 707	2 273	4 574
Canada	11 142	18 088	7 288	11 453	1 477	2 972
Japan	1 323	2 188	1 271	2 233	525	1 123
Other countries	6 991	10 493	4 585	7 444	2 760	5 403
Total	55 047	96 927	41 087	73 337	14 681	29 640
Imports of dried grapes:						
Turkey	4 114	5 751	3 176	3 900	4 921	5 934
Iran	788	875	782	1 035	1 265	1 416
Greece	261	453	701	1 017	706	1 030
Other countries	172	350	67	119	477	710
Total	5 335	7 429	4 725	6 070	7 369	9 090

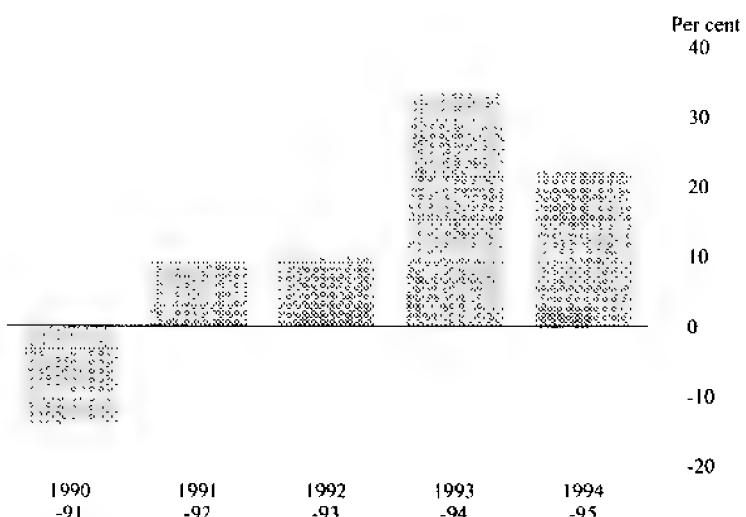
Source: ABS, International Merchandise Trade, Australia (5422.0)

SECTION 10 GRAPE AND WINE PRICES

WINE GRAPE PRICES

In recent years the average prices paid for grapes used in the production of wine in Australia have increased. Following a 14% fall in prices paid for the 1991 vintage, grape prices have risen each year. Grape prices for the 1994 and 1995 vintages were on average up 33% and 22% respectively on the previous years prices. Over the five years to June 1995, grape prices have increased 68%. Using a weighted average price for each grape type, the 1995 grape harvest for wine making was estimated to be worth \$196.9 million for red grapes and \$215.1 million for white grapes.

PRICE INDEX OF GRAPES USED IN WINE PRODUCTION
Percentage change on previous year

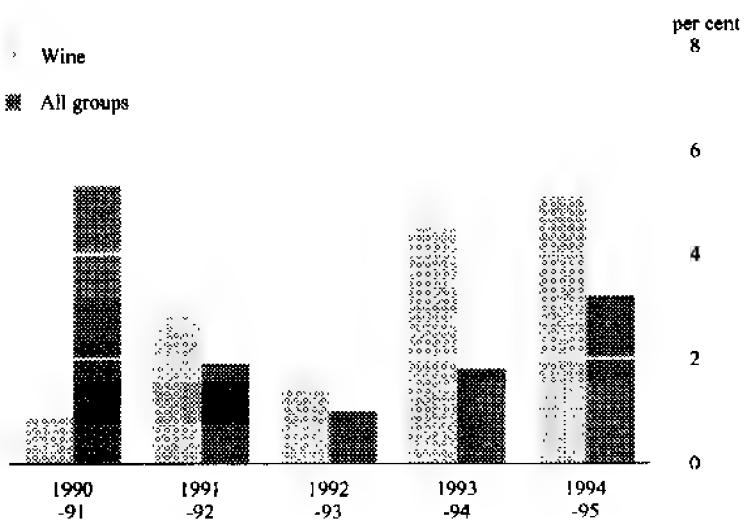


Source: ABS, Price Indexes Indexes on Materials used in Manufacturing Industries (6411.0)

WHOLESALE AND RETAIL WINE PRICES

Prices received by winemakers for wine have generally shown steady growth in recent years. Between 1989-90 and 1994-95 wholesale prices for wine rose by 16%, with table wine prices rising by 16% and fortified wine by 13%. At the retail level, wine price rises have also shown steady growth in recent years to record an identical increase to wholesale prices of 16% over the last five financial years.

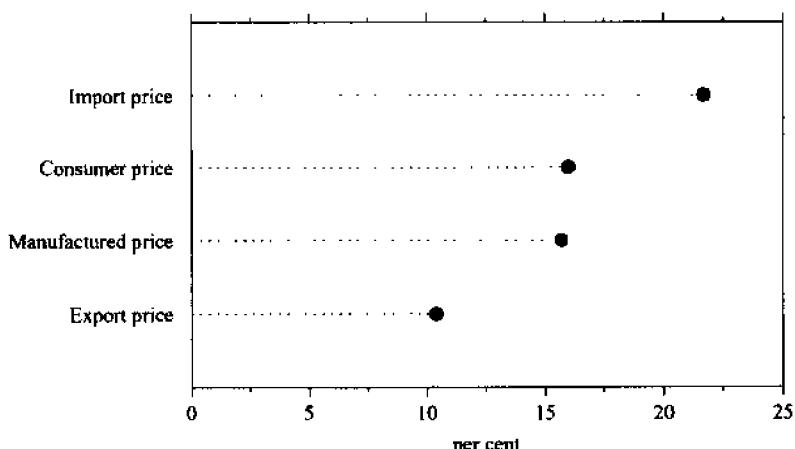
CONSUMER PRICE INDEX
Percentage change on previous financial year



Source: ABS, Consumer Price Index (6401.0)

During the last four financial years retail wine prices rose more steeply than the general consumer price index. Over the last two financial years the retail wine group index rose by 10%, while the all groups index rose by 5%. A significant increase in grape prices and the influence of increasing wine exports are likely to have contributed to recent increases in wine prices.

SELECTED PRICE INDEXES OF WINE, AUSTRALIA
Percentage change 1989-90 to 1994-95



Source: ABS, Producer Price Indexes (unpublished) and Consumer Price Index (6401.0)

EXPORT AND IMPORT PRICES

Export prices received for table wine rose by 7% between 1989-90 and 1990-91. Over the next four financial years the rate of increase has remained very subdued. The cumulative increase over the five year period to 1994-95 is 10%.

SELECTED PRICE INDEXES, PERCENTAGE CHANGE, 1990-91 TO 1994-95, AUSTRALIA

Materials used in	Price index							
	Manufacturing industry							
	Wine grapes	Articles produced by			Consumer		Export	Import
		Table wine	Fortified wine	Wine	Wine	All groups	Table wine	Wine
1990-91	-14.1	-3.3	2.7	-1.6	0.9	5.3	7.0	12.1
1991-92	9.2	5.9	-1.0	4.2	2.8	1.9	0.4	5.5
1992-93	9.9	2.7	3.1	2.8	1.8	1.0	1.6	5.8
1993-94	33.4	3.8	3.2	3.6	4.5	1.8	0.2	-5.8
1994-95	22.2	6.5	4.1	5.9	5.1	3.2	1.0	3.1
1989-90 to 1994-95	68.1	16.3	12.5	15.7	16.0	13.9	10.4	21.7

Source: ABS, Consumer Price Index (6401.0), Producer Price Indexes (unpublished data)

Average import prices for all wine products rose by 12% between 1989-90 and 1990-91. Since then the index has steadily increased except for a 6% decrease in 1993-94, and has lead to a cumulative increase over the past five years of 22%.

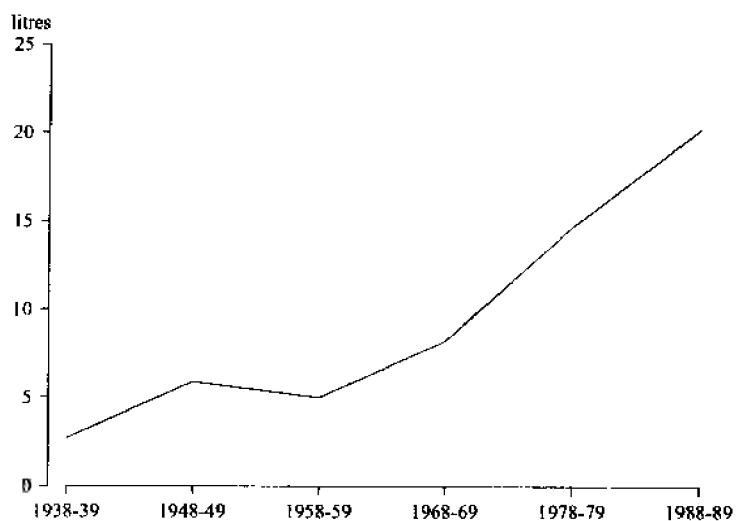
SECTION 11 WINE CONSUMPTION

Data on the consumption of wine in Australia are available from measures of Apparent Consumption of Foodstuffs and Nutrients and from periodic surveys in which members of individual households provide information on their consumption of alcohol. Details of household spending on alcohol are also available from a periodic household expenditure survey.

APPARENT CONSUMPTION

Using aggregates of wine production, net change in stocks, imports and exports etc., estimates of wine available for consumption are made each year and a mean population is applied to derive average apparent consumption.

PER CAPITA CONSUMPTION OF WINE, AUSTRALIA¹



(1) Measures are based on averages over 3 year periods ended 1938-89 to 1988-89.
Source: ABS, *Apparent Consumption of Foodstuffs and Other Nutrients* (4306.0)

Wine consumption per head of population in Australia has recorded strong growth since the late 1930s rising from a low 2.7 litres over the three years to 1938-39 to 20.2 litres over the three years to 1988-89. The growth in each decade of the fifty year period was interrupted only by a dip at the end of the 1950s. The sevenfold increase in wine consumption may be contrasted with the twofold increase in per capita beer consumption over the same period.

APPARENT PER CAPITA CONSUMPTION OF ALCOHOL, AUSTRALIA, 1938-39 TO 1993-94^p

	Average 3 years ended						Current year
	1938-39	1948-49	1958-59	1968-69	1978-79	1988-89	1993-94 ^p
BEVERAGE (litres)							
Wine	2.7	5.9	5.0	8.2	14.7	20.2	18.5
Beer	53.2	76.8	99.7	113.5	133.2	111.6	99.0
ALCOHOL (litres of alcohol)							
Wine	0.35	0.77	0.87	1.15	1.98	2.35	2.13
Beer	2.55	3.58	4.79	5.45	6.40	5.04	4.35
Spirits	0.60	0.80	0.74	0.89	1.21	1.23	1.28
Total alcohol	3.40	5.15	6.40	7.49	9.59	8.62	7.76

Source: ABS, *Apparent Consumption of Foodstuffs and Nutrients, Australia* (4306.0).

ABS, *Apparent Consumption of Selected Foodstuffs, Australia, 1993-94, Preliminary* (4315.0).

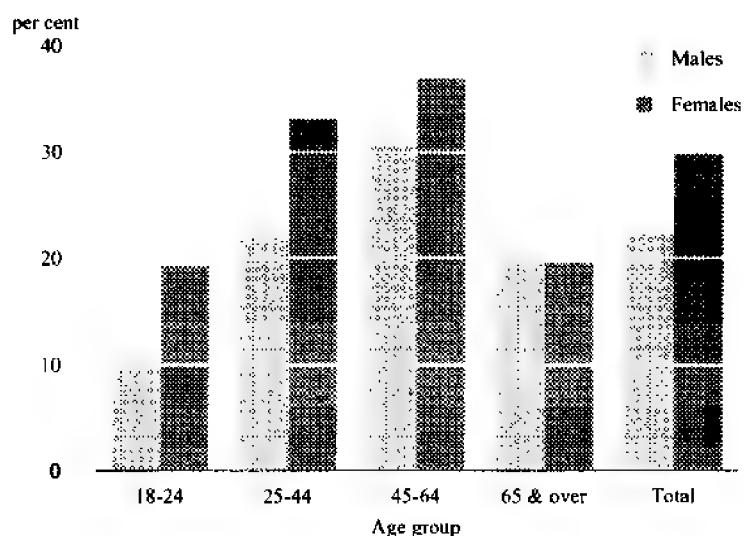
In recent years per capita consumption of wine has been flat at 18.4 litres in 1989-90, 17.8 litres in 1990-91, 18.6 litres in 1991-92, 18.2 litres in 1992-93 and 18.5 litres in 1993-94. Based on the population aged 18 years and over, the 1993-94 apparent consumption was 25.1 litres per person.

In 1993-94 a total of around 328 million litres of wine was consumed in Australia, an increase of 3% on the previous year.

PROFILE OF WINE DRINKERS

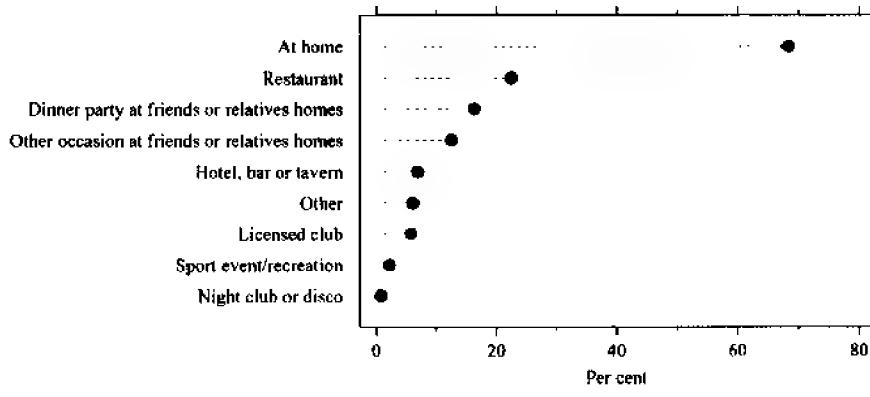
It is estimated that approximately 3.4 million people, or 26% of the population aged 18 years and over, drank some wine in any week in 1994-95. Nearly 30% of females drank wine compared with 22% of males. In the 65 and over age group, a similar proportion of males and females drank wine whereas in the 18-24, 25-44 and 45-64 age groups more females drank wine.

PROPORTION OF PERSONS AGED 18 YEARS AND OVER WHO DRANK WINE, AUSTRALIA, 1994-95



Source: ABS, *Population Survey Monitor, 1994-95*

PLACES WHERE WINE WAS CONSUMED BY ADULTS WHO DRANK WINE, 1994-95



Source: ABS, *Population Survey Monitor, 1994-95*

White wine was more likely to have been consumed by females than males. It is estimated that 21% of females drank white wine compared with 12% of males. The reverse was true for red wine consumption — 10% of males compared with 8% of females. Sparkling wine was consumed by 5% of the adult population, and 3% drank fortified wine.

It is estimated that 72% of those persons who drank wine consumed wine mainly with a meal. Wine was consumed at home by 68% of wine drinkers, 29% drank wine at friends or relatives homes and 22% at restaurants. Saturday was the most popular day of the week for drinking wine with 71% of wine drinkers consuming on that day, followed by Sunday (57%) and Friday (54%).

EXPENDITURE ON WINE

During 1988-89 Australian households spent an average of \$3.07 per week on wine. Households in the Australian Capital Territory spent the most (\$5.42) and those in Tasmania the least (\$1.82). Australian Capital Territory households also had the highest proportion of their total expenditure on alcohol directed to wine (29%) while Queensland households allocated only 11% of total weekly expenditure on alcohol to wine.

AVERAGE WEEKLY HOUSEHOLD EXPENDITURE, ALCOHOLIC BEVERAGES, STATES, AUSTRALIA, 1988-89

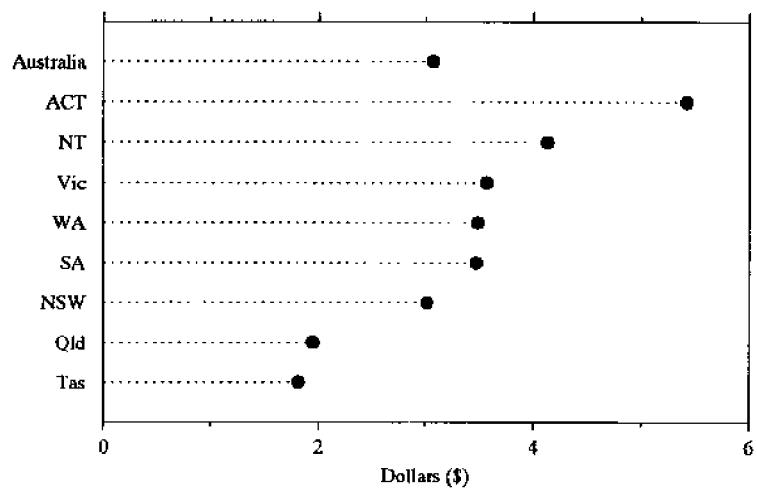
	NSW	Vic.	Qld	SA	WA	Tas.	NT ¹	ACT	Aust.
	dollars	dollars	dollars						
Wine	3.01	3.56	1.95	3.47	3.48	1.82	4.13	5.42	3.07
Beer	9.93	8.58	11.19	8.48	10.97	8.01	18.64	8.41	9.74
Spirits	2.82	2.79	3.51	2.59	3.38	1.69	3.86	4.22	2.96
Total²	16.82	16.12	18.02	15.67	18.56	12.67	30.48	18.80	16.90

¹ Darwin and environs and Alice Springs only.

² Including other alcoholic beverages.

Source: ABS, *Household Expenditure Survey, Australia, Detailed Expenditure Items, 1988-89* (6535.0)

AVERAGE WEEKLY HOUSEHOLD EXPENDITURE ON WINE, 1988-89



Source: ABS, *Household Expenditure Survey, Australia Detailed Expenditure Items, 1988-89* (6535.0)

SECTION 12 PERSONS EMPLOYED IN THE WINE AND GRAPE PRODUCTION INDUSTRIES

The Population Census of 6 August 1991 identified 4,358 persons whose main job was in grape growing and 5,628 persons whose main job was in the manufacturing or blending of wine or brandy. This excludes casual workers such as grape pickers and other seasonal workers not working in those industries in August. Of the grape industry workers, 49% were farmers and farm managers, 35% were farm hands and 3% were plant and machine operators and drivers. For the wine and brandy industry, 16% were farm hands, 15% were packaging operators, 12% clerks, 6% farmers and farm managers and 7% 'other professionals' which includes research workers.

As well 4,433 persons were employed in establishments mainly engaged in wholesaling beer, wine and spirits and a further 8,251 persons were employed in retail liquor stores.

LABOUR FORCE, SELECTED CHARACTERISTICS OF EMPLOYED PERSONS, AUSTRALIA, 1991

	Grape growing	Wine and brandy manufacturing	All industries
	%	%	%
Status of worker:			
Wage or salary earner	49.7	91.5	81.7
Self employed	32.3	3.9	10.6
Employer	15.4	4.1	6.8
Unpaid helper	2.6	0.6	0.9
Full-time	74.3	77.6	68.9
Part-time	23.8	21.2	25.8
Not stated	1.9	1.2	5.2
Annual Individual Income:			
\$0-\$12 000	33.6	16.9	18.6
\$12 001-\$25 000	46.0	52.5	39.1
\$25 001-\$50 000	13.6	23.5	33.2
Over \$50 000	3.1	4.6	5.8
Not stated	3.7	2.5	3.4

Source: ABS, 1991 Census of Population and Housing (unpublished data).

About 48% of all persons employed in the grape growing industry were self employed persons and employers compared with 8% in wine and brandy manufacturing and 17% across all industries.

At the time of the Census, the proportion of persons working full-time in the grape growing and wine and brandy industries was slightly higher than for all industries.

There was a higher proportion of low income earners, (workers with an annual income of less than \$12,000) in the grape growing industry (34%) than in wine and brandy (17%) and for all industries (19%). At the upper end 17% of workers in the grape growing industry earned over \$25,000 compared with 28% in the wine and brandy industry. Both figures are significantly lower than that for all industries (39%).

SOCIAL CHARACTERISTICS OF EMPLOYED PERSONS, AUSTRALIA, 1991

	Grape growing	Wine and brandy manufac- turing	All industries
	%	%	%
Level of highest qualification:			
Degree or higher	3.6	8.2	11.4
Other qualification	14.7	20.1	25.5
No qualification	75.6	64.5	54.3
Inadequately described or not stated	6.1	7.2	8.8
Sex:			
Male	66.0	62.3	57.4
Female	34.0	37.7	42.6
Age (years):			
15-24	12.2	16.3	19.5
25-34	20.9	29.7	26.5
35-44	26.3	27.6	26.7
45-54	21.2	16.7	17.8
55 or more	19.4	9.7	9.5
Birthplace:			
Australia	79.1	84.0	74.2
Overseas main English speaking countries	5.4	9.7	11.7
Southern Europe	12.0	2.2	4.5
Other Europe	2.1	2.6	2.8
Other	1.5	1.5	6.9
Marital status:			
Married	71.6	63.3	60.3
Never married	21.2	27.6	30.2
Separated, divorced, widowed	7.2	9.2	9.5

Source: ABS, 1991 Census of Population and Housing (unpublished data).

Educational qualifications were less common among workers in both the grape growing and wine and brandy manufacturing industries than in all industries. Only 4% of grape growers had a degree or higher and 8% in wine and brandy manufacturing compared with 11% across all industries.

The grape growing and wine industries have a slightly higher male:female ratio than for all employed persons. Grape growing workers tend to be older with 41% being more than 45 years of age compared with 26% of wine and brandy workers.

The grape growing and wine manufacturing industries have a higher proportion of Australian born workers compared with all industries. However, of those grape growing workers born overseas, the incidence of southern Europe is strong. The proportion of grape growing workers born in southern Europe was more than four times that of wine manufacturing and more than twice that of all industries.

SECTION 13 WORLD COMPARISONS

VINE AREA, GRAPE PRODUCTION AND YIELD

By world standards the Australian wine industry is young. While comparatively small it is reported as being at the forefront of world practices in grape growing and wine making techniques. Of the countries for which 1993 data are available Australia ranked seventeenth for total grape production and twenty-sixth for area of vine.

With grape production of Romania surpassing that of Australia and with separate data now available from the countries of the former Yugoslavia and the former USSR, the rankings of Australia were lower in 1993 than those previously published for 1992.

GRAPE PRODUCTION, AREA OF VINES, YIELD, COUNTRIES OF THE WORLD, 1993

Country	Production			
	Total grapes '000 tonnes	Wine grapes '000 tonnes	Area of vines '000 ha	Yield tonnes/ha
Italy	9 756.8	8 219.7	981.0	9.9
France	6 741.1	6 618.0	942.0	7.1
USA	5 464.9	n.a.	325.0	16.8
Spain	4 460.8	4 108.0	1 370.0	3.3
Turkey	3 700.0	n.a.	567.0	6.5
Argentina	1 941.6	1 889.7	205.0	9.5
Iran	1 850.0	n.a.	254.0	7.3
China and Taiwan	1 355.0	n.a.	168.0	8.1
Romania	1 327.1	1 184.1	251.0	5.3
Chile	1 300.2	543.7	112.0	11.6
Portugal	1 300.0	n.a.	370.0	3.5
South Africa	1 252.2	1 023.5	102.0	12.3
Germany	1 166.2	1 166.2	106.0	11.0
Greece	1 140.7	434.2	132.0	8.6
Moldova	927.8	n.a.	162.0	5.7
Azerbaijan	900.0	n.a.	120.0	7.5
Australia	794.0	546.5	63.0	12.6
Bulgaria	697.0	616.0	145.0	4.8
Hungary	607.0	558.7	132.0	4.6
Russian Federation	500.0	n.a.	112.0	4.5
Georgia	500.0	n.a.	90.0	5.6
Ukraine	489.0	n.a.	149.0	3.3
Former Yugoslav Republics of Serbia and Montenegro	397.0	n.a.	90.0	4.4
Syria	354.0	n.a.	66.0	5.4
Algeria	250.0	n.a.	100.0	2.5
Uzbekistan	n.a.	n.a.	130.0	n.a.
Other countries	7 313.0	n.a.	1 037.0	7.1
World total	56 485.4	n.a.	8 281.0	6.8

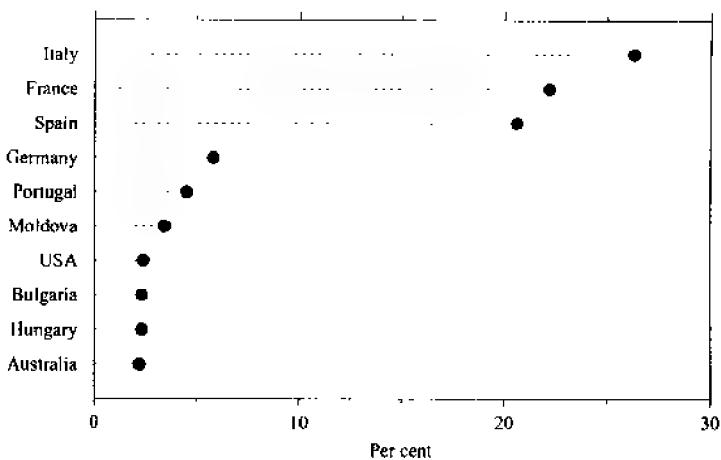
Source: Office International de la Vigne et du Vin (OIV).

Total grape production in Australia in 1993 was 1.4% of the world total, falling from 1.6% in 1992 partly due to a poor harvest. In Australia 69% of all grapes grown were intended for use in winemaking, with the balance being used for drying (25%) or as fresh fruit (6%). In Italy and France, the two largest producers of grapes, 90% of all grapes produced were used for winemaking. Australia had an area of 63,000 hectares under grapevines which was less than 1% of the world total. Spain, the largest cultivator, had an area of vines twenty-two times the size of that of Australia.

A distinguishing feature of Australian viticulture is its relatively high yield which was 12.6 tonnes of grapes per hectare in 1993 (averaging 14.3 over three years). Of the countries in the above table, only USA had a higher yield. The largest cultivator, Spain, had a yield of 3.3 tonnes per hectare in 1993.

WINE PRODUCTION

SHARE OF THE WORLD EXPORTS OF WINE, 1993 Principal Countries



Source: *Office International de la Vigne et du Vin (OIV)*

Australia ranked tenth in volume of world wine production in 1993. The three largest producers, Italy, France and Spain, contributed 54% of total production. By comparison Australia produced less than 2% of the world total and Italy produced thirteen times more wine than did Australia.

In 1993 Australia exported 102.9 million litres of wine, which was an increase of 31% from the 78.5 million litres reported in 1992 and represented 2% of total wine exports. Hungary increased wine exports by 38% from 78.4 to 108.3 million litres resulting in Australia falling in rank from ninth to tenth. The countries exporting the largest volumes of wine were Italy (26%), France (22%) and Spain (21%, up from 15% in 1992). The increase in exports of Spain largely contributed to the global increase of 5% to 4,734.8 million litres in 1993 compared with 1992.

Australia exported 22% of its total wine production while Bulgaria, Portugal and Moldova exported over 48% of their wine production. South Africa exported only 3% of its production.

WINE PRODUCTION, EXPORTS AND PER CAPITA CONSUMPTION, PRINCIPAL COUNTRIES OF THE WORLD, 1993

Country	Wine production	Share of world production	Wine exports	Share of world exports	Exports as a proportion of production	Per capita consumption
	million litres	%	million litres	%	%	litres
Italy	6 229.5	24.0	1 246.6	26.3	20.0	¹ 60.7
France	5 328.5	20.6	1 050.2	22.2	19.7	¹ 64.5
Spain	2 549.0	9.8	974.7	20.6	38.2	39.2
USA	1 660.0	6.4	115.4	2.4	7.0	6.1
Argentina	1 447.0	5.6	33.0	0.7	2.3	48.1
Germany	971.8	3.7	274.7	5.8	28.3	22.9
South Africa	916.2	3.5	25.0	0.5	2.7	8.3
Russian Federation	750.0	2.9	n.a.	n.a.	n.a.	
Romania	583.9	2.3	16.0	0.3	2.7	27.0
Australia	461.8	1.8	102.9	2.2	22.3	18.2
Portugal	435.5	1.7	212.2	4.5	48.7	¹ 55.0
Hungary	364.0	1.4	108.3	2.3	29.8	30.0
Brazil	360.0	1.4	20.8	0.4	5.8	¹ 1.8
China and Taiwan	350.0	1.3	6.6	1.4	1.9	n.a.
Greece	337.8	1.3	43.3	0.9	12.8	32.2
Moldova	337.0	1.3	162.5	3.4	48.2	n.a.
Chile	330.2	1.3	86.6	1.8	26.2	¹ 29.5
Mexico	242.2	0.9	1.1	n.a.	0.5	n.a.
Croatia	208.1	0.8	n.a.	n.a.	n.a.	
Bulgaria	200.8	0.8	108.8	2.3	54.2	¹ 12.4
Other countries	1 863.6	7.2	86.7	1.8	4.7	n.a.
World total	25 926.9	100.0	4 734.8	100.0	18.3	n.a.

¹ 1992.

Source: Office International de la Vigne et du Vin (OIV)

CONSUMPTION

Average per capita wine consumption in Australia is modest in comparison with that of other major wine producing countries. Per capita consumption in Australia of 18 litres in 1993 was less than one-third that of France and Italy which recorded consumption of over 60 litres per person in 1992.

TABLE AND DRIED GRAPES

Australia is a small producer of table grapes and ranked twenty-fourth in the world. Italy was the largest producer followed by Turkey. Statistics available on exports of table and dried grapes in 1993 are incomplete. Australia exported 12,800 tonnes of table grapes compared with the largest exporter, Italy, with 582,100 tonnes.

Australia ranked fifth and contributed to 4% of the world dried grape production in 1993. Australia fell from fourth position as production fell from 82,100 tonnes in 1992 to 43,500 tonnes. In exports, Australia ranked fourth in 1993 up from fifth position in 1992.

PRODUCTION AND EXPORTS OF TABLE AND DRIED GRAPES, PRINCIPAL COUNTRIES OF THE WORLD, 1993

Country	Table grapes		Dried grapes	
	Production	Exports	Production	Exports
	'000 tonnes	'000 tonnes	'000 tonnes	'000 tonnes
Italy	1 487.1	582.1	n.a.	0.3
Turkey	921.0	22.5	360.0	118.0
Chile	756.5	417.0	25.9	19.4
USA	532.5	203.8	328.9	122.0
Spain	344.8	49.2	2.7	0.6
Greece	273.7	96.8	90.9	67.0
Brazil	260.7	n.a.	n.a.	n.a.
Algeria	256.5	n.a.	n.a.	n.a.
Japan	236.5	n.a.	n.a.	n.a.
Syria	192.0	n.a.	12.0	n.a.
Afghanistan	158.0	n.a.	28.0	25.0
Portugal	150.0	n.a.	n.a.	n.a.
Romania	142.7	n.a.	n.a.	n.a.
France	123.1	14.3	n.a.	0.6
Morocco	114.7	n.a.	1.5	n.a.
S Africa	109.6	67.1	29.8	29.7
Egypt	100.0	2.0	n.a.	n.a.
Ukraine	89.5	n.a.	n.a.	n.a.
Lebanon	88.0	n.a.	10.0	n.a.
Bulgaria	81.0	n.a.	n.a.	n.a.
Moldova	78.8	n.a.	n.a.	n.a.
Mexico	77.5	n.a.	7.5	5.3
Jordan	63.7	n.a.	0.2	n.a.
Australia	50.4	12.8	43.5	55.1
Iran	30.0	n.a.	90.0	50.0
China and Taiwan	n.a.	n.a.	13.7	1.8
Other countries	373.9	n.a.	9.9	n.a.
World total	7 092.2	n.a.	1 054.5	n.a.

Source: Office International de la Vigne et du Vin (OIV).

IMPORTS

Australia is a relatively small importer of grape products. In 1993 Australia imported 7.4 million litres of wine, 100 tonnes of table grapes and 5,300 tonnes of dried grapes. Germany was the largest importer of wine and table grapes and the second largest in dried grapes. The United Kingdom was the largest dried grape importer, taking 24% of the global imports, and the second largest importer of wine followed closely by France. USA followed closely behind Germany in imports of table grapes.

It is interesting to note that in 1994-95 Australia exported wine directly to all of the countries in the table below except Romania and Slovenia. Australia exported dried grapes to the countries importing over 10,000 tonnes of dried grapes. In 1994-95, table grapes were not exported to the USA, the second largest importer of fresh grapes in 1993.

IMPORTS OF WINE, TABLE AND DRIED GRAPES, PRINCIPAL COUNTRIES OF THE WORLD, 1993

Country	Wine million litres	Table grapes '000 tonnes	Dried grapes '000 tonnes
Germany	884.9	336.6	72.0
United Kingdom	656.3	89.2	122.1
France	595.6	141.4	20.2
Russian Federation	250.0	n.a.	n.a.
USA	235.8	321.5	7.7
Belgium	229.4	n.a.	n.a.
Netherlands	191.5	n.a.	46.0
Switzerland	175.7	39.9	3.9
Canada	152.4	n.a.	32.7
Denmark	118.5	n.a.	6.0
Sweden	102.7	24.8	6.1
Japan	65.0	7.8	29.1
Italy	39.6	8.4	18.1
Poland	34.0	n.a.	8.2
Romania	33.0	n.a.	1.2
Slovenia	29.6	n.a.	n.a.
Finland	27.7	n.a.	3.3
Norway	26.9	n.a.	3.9
Austria	19.7	47.7	7.8
Australia	7.4	0.1	5.3
Other countries	n.a.	n.a.	117.8
World total	n.a.	n.a.	517.7

Source: Office International de la Vigne et du Vin (OIV).

WORLD TRENDS

The Office International de la Vigne et du Vin (OIV) reports that measures being taken in many countries to reduce the number of alcohol related road accidents and alcoholism, increased prohibition in some places and health related changes in lifestyles are all contributing to a global decline in wine consumption. The OIV believe the promotion of the positive effects of wine consumption is responsible for halting the decline to less than 1% from 1992 to 1993. World consumption for 1993 was 22,374 million litres, 20% down from the average of 1981-85. Over the same period, world wine production fell by 22% to 25,927 million litres. Resulting surpluses have decreased from 23% of production in 1992 to 14% or 3,553 million litres in 1993. The OIV sees a potential for development of non-fermented vine products (*i.e.* table grapes, raisins and grape juice based products).

Since the 1980s total wine consumption by Australians has remained steady and in 1993 was 320 million litres. Against the background of global contraction Australia has increased production by 15% largely due to a twelvefold increase in exports since 1981-85.

SOURCE

The international comparisons in this section are sourced from the Office International de la Vigne et du Vin (OIV), are incomplete or inaccurate for some countries and are subject to revision. The OIV does not distinguish zero and not available figures in its statistical publication and these have been shown as 'n.a.' (not available) in this section. The Australian figures used in this world comparison have been revised in Section 4, Wine Production, but the original figures are shown here to enable a world comparison to be made. It should also be noted that some data for Australia relate to the 1992-93 financial year.

EXPLANATORY NOTES FOR VITICULTURE, WINE PRODUCTION AND STOCKS

INTRODUCTION

1 Most of the data used in this publication were obtained from various ABS collections for which publications with appropriate Explanatory Notes are already available. The Bibliography contains a list of these publications. However, much of the data contained in Sections 2, 4, 5, 6 and 7 are only available in this publication and the following notes are provided to assist users.

2 Section 2 replaces *Viticulture, Australia* (7310.0) and contains information on area of vines and production of red and white grapes for the 1994-95 season. Details are shown at the level of major grape growing regions, States and Australia. Varietal data are shown at the Australian level only, but are available on a regional basis for a charge, on application to the ABS. The continuing collection of varietal data is partly funded by the Grape and Wine Research and Development Corporation.

3 Sections 4, 6 and 7 contain information on commercial production of wine, materials used in winemaking and stocks of wine, brandy, grape spirit and unfermented grape juice classified according to end use. Section 11 has a table showing small area data on wine production for South Australia and New South Wales. Small area data for other States may be available on request.

SCOPE AND COVERAGE OF VITICULTURE SURVEY

4 Agricultural statistics in section 2 relate to the year ended 30 June and are derived from information obtained in a supplementary collection of all growers who reported vines in the annual Agricultural Census conducted at 31 March. This supplementary collection is not conducted in the Territories, but some data for the ACT and NT will become available with the release of final Agriculture Census results.

5 The ABS has in the recent past excluded from the Census those establishments which make only a small contribution to overall agricultural production. From 1986-87 the scope of the Census included those establishments undertaking agricultural activity and having an estimated value of agricultural operations (EVAO) of \$20,000 or more. From 1991-92 to 1992-93, only those establishments with an EVAO of \$22,500 or more were included. From 1993-94 Census was based on a scope of \$5,000 or more EVAO.

6 The change in scope means the last two years' viticulture results are not directly comparable to previous results. To assist users in making comparisons, selected data from the 1993-94 viticulture collection were retabulated on both the \$5,000 and \$22,500 basis. Bridging tables were included in the publication *Viticulture, Australia, 1993-94* (Cat. No. 7310.0).

7 Tasmanian data is derived from a collection undertaken by the Appellation of Origin Board under the authority of The Commissioner of Licensing. The scope of the collected data is the same as for other States.

8 Statistics are provided for the several recognised grape growing regions of each State which are described below:

New South Wales	<p>Hunter Valley comprising the local government areas of Greater Cessnock, Muswellbrook, Scone and Singleton.</p>
	<p>Murrumbidgee Irrigation Area comprising the local government areas of Leeton and Griffith.</p>
	<p>NSW Sunraysia comprising the local government areas of Wakool, Balranald and Wentworth.</p>
Victoria	<p>Victorian Sunraysia comprising the local government areas of the City of Mildura and Shire of Mildura.</p>
	<p>Kerang-Swan Hill comprising the local government areas of the Cities of Kerang and Swan Hill and the Shires of Kerang and Swan Hill.</p>
South Australia	<p>The regions adopted in South Australia correspond to the Phylloxera Board's districts which are as follows:</p>
	<p>Central District (incl. Kangaroo Island) comprising the district councils of Gumeracha, East Torrens, Onkaparinga, Stirling, Mount Barker, Willunga, Strathalbyn, Port Elliot and Goolwa, Victor Harbor, Yankalilla, Kingscote and Dudley and the Corporations of Adelaide, Brighton, Burnside, Campbelltown, Glenelg, Happy Valley, Henley and Grange, Hindmarsh and Woodville, Kensington and Norwood, Marion, Mitcham, Munno Para, Noarlunga, Payneham, Port Adelaide, Prospect, Salisbury, Tea Tree Gully, Unley, West Torrens, Woodville, Enfield, Elizabeth and the Municipalities of Gawler, Thebarton, St Peters and Walkerville.</p>
	<p>Barossa District comprising the district councils of Barossa, Tanunda, Mallala, Light, Kapunda, Angaston, Mount Pleasant, those portions of the district council of Wakefield Plains south of the River Wakefield, the Hundreds of Dutton and Jellicoe in the district councils of Ridley/Truro.</p>
	<p>Waikerie and Lower Murray District comprising the district councils of Morgan, Waikerie, Mannum, Murray Bridge and Meningie, and the Hundreds of Anna and Skurray in the district council of Ridley/Truro.</p>
	<p>North Murray District comprising the district councils of Barmera, Berri, Paringa, the Municipality of Renmark and Hundred of Katarapko and the Counties of Young and Hamley not otherwise included.</p>
	<p>South Murray District comprising the district councils of Loxton, Browns Well, Karoonda-East Murray, Peake, Lameroo and Pinnaroo.</p>
	<p>Northern District comprising those portions of the district council of Wakefield Plains north of the River Wakefield, the district councils of Clare, Riverton, Saddleworth and Auburn, Eudunda and Robertstown and the remainder of the State north and west of these areas which are not included in the above five districts.</p>
	<p>South Eastern District comprising the district councils of Coonalpyn Downs, Tatiara and Lacepede and the remainder of the State south and south-east of these areas which are not included in the above districts.</p>

Western Australia Swan Shire comprising the local government area of the Shire of Swan.

Margaret River comprising the local government areas of Augusta-Margaret River and Busselton.

SCOPE AND COVERAGE OF WINE SURVEYS

9 Wine production data are collected only from enterprises which crush more than 400 tonnes of grapes. These wineries account for approximately 97% of total crushings by all enterprises crushing 50 or more tonnes. Limited information on the quantity of grapes crushed and domestic wine sales are also obtained from enterprises crushing between 50 and 400 tonnes. The main purpose for this supplementary collection is to establish the scope and coverage of both the main production collection and the monthly wine sales collection.

10 Details on stocks of wine by wine type are collected at 30 June from Australian winemakers with wine sales of 250,000 litres or more in the previous year. All data are collected on an Australia-wide basis only and State figures are therefore not available.

11 The number of enterprises which fall within the scope of the wine stocks collection (see paragraph 10 above) may vary from year to year as sales vary and individual wineries are included in, or excluded from, the collection. It is possible that stock data may vary slightly each year as new wineries, with either large or small stocks, come into the scope of the collection. In particular, the published (*i.e.* closing) stocks figures for any one year may not equate with the opening stocks for the following year.

12 The wine content of products consisting of a mixture of wine and fruit juice, commonly known as 'coolers', is included in the appropriate wine category of the wine from which it is made, which is generally table wine.

SYMBOLS AND OTHER USAGES

n.a. not collected

n.p. not available for separate publication (but included in totals where applicable)

p preliminary

r revised

— nil or rounded to zero

Where figures have been rounded, discrepancies may occur between sums of the component items and totals.

BIBLIOGRAPHY

ABS DATA

Much of the ABS data used in this compendium were sourced from various ABS publications and in some cases unpublished data were used. In the list of ABS publications below a catalogue number is quoted whenever possible to enable users to access explanatory information about various collections, even if the specific data used in this compendium were not published.

1991 Census of Population and Housing, Basic Community Profile (2722.0)
AgStats database (small area agricultural commodity data)
Apparent Consumption of Foodstuffs and Nutrients, Australia (4306.0)
Apparent Consumption of Selected Foodstuffs, Australia, Preliminary
(4315.0)
Consumer Price Index (6401.0)
Export Price Index (6405.0)
Household Expenditure Survey, Australia: Detailed Expenditure Items, 1988-89 (6535.0)
Import Price Index (6414.0)
International Merchandise Trade, Australia (5422.0)
Manufacturing Industry, Australia (8221.0)
Population Survey Monitor (4103.0)
Price Indexes of Materials Used in Manufacturing Industries (6411.0)
Price Indexes of Articles Produced by Manufacturing Industries (6412.0)
Sales of Australian Wine and Brandy by Winemakers (8504.0)

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OTHER PUBLICATIONS

Tinlot, Robert and Rousseau, Michèle. 1994. The State of Vitiviniculture in the World and the Statistical Information in 1993. Office International de la Vigne et du Vin: Paris, France.



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